Central Management Services

Remedy 6.0 Users Guide

REMEDY 6.0 TABLE OF CONTENTS

ROLES AND GENERAL KNOWLEDGE

The BCCS IT Service Desk Consolidation Project has been designed to provide end-to-end service support processes for twelve State of Illinois agencies. This project encompasses the consolidation of all provisioning and Service Desk support functions into a single call center, the utilization of a Governance model, and the establishment of processes and metrics to manage and monitor performance. The goal of this project is to provide a standard and centralized IT Service Desk environment that utilizes a standard set of processes and procedures to provide State of Illinois customers with the highest level of focused IT support. To this end, the State of Illinois has adopted ITIL best practices and has implemented the use of the Remedy ITSM product suite.

This Remedy User Guide has been developed to provide detailed information and to serve as a reference on how to navigate and use the Remedy ITSM Help Desk application and document the CMS-BCCS Business Rules associated to Service Desk and ESR Processes as modified by the State of Illinois. It is intended for use by Tier 1, Tier 2 and Tier 3 support technicians, and managers who provide services to help resolve problems and implement changes to maintain and enhance the State of Illinois infrastructure.

If you need help OR HAVE QUESTIONS after taking this course, please contact one of the following:

- Contact the CSC-IT Service Desk at: (217) 524-4784 or Outside of Springfield (800) 366-8768
- Gary Wasilewski, , CSC Quality and Assurance 217-557-8000 Gary.Wasilewski@illinois.gov or
- Tom Seagraves, Operations Manager for IT Service Desk and Process Owner of Enterprise Service Request (ESR)- Tom.Seagraves@illinois.gov

If you have changes or comments on Remedy: Assignment Groups, Group Members, Modification to CTIs, Summaries, or Tasks, call or e-mail the following:

Discuss Changes or needs with your manager, if no resolution the manager should contact the following:

- First Contact the CSC-IT Service Desk at: (217) 524-4784 or Outside of Springfield (800) 366-8768

Then

- Gary Wasilewski, CSC Quality and Assurance 217-557-8000 Gary.Wasilewski@illinois.gov or

WHAT IS THE DIFFERENCE BETWEEN AN INCIDENT AND A CHANGE REQUEST ?

CMS ENTERPRISE SERVICE DESK (HELP DESK)	Incident	Primary Goal To restore service operation as quickly as possible and minimize the adverse impact on business operations.	Definition Any event which is not part of the standard operation of a service and which causes, or may cause, an interruption to or reduction in the quality of that service. *Examples* Service not available Application bug / query not working Printer not printing Alert / Error message reported Inaccessible configuration Password reset / threshold reached Break/fix equipment Video conference issues Telephone has no dial tone PBX is down

	Problem	Primary Goal To minimize the adverse impact of incidents or problems; and to prevent recurrence of incidents related to these errors by initiating a root cause analysis.	Definition A “Problem” is an unknown underlying cause of one or more incidents. A “Known Error” is a problem that has subsequently been diagnosed and for which a work-around has been identified. *Examples* Proactive prevention of problems Identification of trends in recurring incidents Completion of major outage reviews Documentation of known error controls Tracking of configuration item history within the CMDB Identification of steps for irreversible corrective action to mitigate problem

CMS	Enterprise	Primary Goal	Definition
ENTERPRISE CHANGE MANAGEMENT	Service Request (ESR)	To provide the end user a means to request standard or routine software or hardware related additions, moves or changes to their desktop system.	A request opened by the end user to initiate routine desktop support service for changes to software or hardware configuration items related to supporting the business, which often times may be opened by calling the service desk. *Examples* Addition of new software to desktop PC Configuration or relocation of a Printer Establishment of access to a database, business application or system Change of end user access privileges Setup of a new E-mail account

	Request For Change (RFC)	Primary Goal To ensure that standard methods and procedures are used for efficient handling of all Infrastructure changes, and to minimize impact of change-related incidents to improve service quality.	Definition The process for moving from one desired state to another, based on the scheduling and coordination approved by a Change Advisory Committee (CAC), and assessment of the impact of Configuration Items related to the successful implementation of a requested change. *Examples* Network / Telecom / changes or outages Server related configuration changes Changes or Downtime related to business applications Large, coordinated hardware moves Facilities / property control related changes

TABLE OF BUSINESS RULES FOR EASY ACCESS

1. **Initiation to open a new Service Request**
   Description: Agency / Customer identify a need for requesting service and takes necessary steps to seek internal approval(s) to initiate a request with CMS through their authorized methods.

STEP	OBJECTIVE(S)	REQUEST STATUS	RESPONSIBLE AREA	ACTIVITIES	BUSINESS RULES
1a.	Authorize the need to open a new service request	N/A	Requested For	• Contacts their identified / authorized agency Requested By to consult opening a request • Provides detailed information on what purpose and specific need for request • Provides up to date contact and affected asset tag(s) information • Identifies time frame or expectation to complete	• Requested For is responsible to solicit their designated agency Requested By only for all requests for service • Requested For is responsible to consult with designated Task Coordinator or Requested By to check on the Status of an opened request • Requested For or a designee is responsible to be available at the date and time of when the Support Technician would be onsite to

				request (Urgency and Requested Date fields)	complete the work (when applicable)
1b.	Gain internal approval(s) to justify submitting a new service request	N/A	Requested By	• Consults with Requested For to identify / validate service request work details • Reviews Requester contact and asset details for correctness • Identifies necessary approval steps and may consult with Management to gain sign off authorization to open a new service request	• Requested By is responsible for identifying all internal approvals required to authorize the process of initiating a service request • Requested By is responsible for ensuring all agency specific policy / audit requirements are followed when gaining the internal approvals for initiating a service request

2. Submit a Service Request form to the CMS Service Desk

Description: Authorized agency Requested By completes ESR Form Attachment and submits an Email to the Service Desk to initiate a new service request. Service Desk will review request to ensure authorized approver is documented before creating a new request.

STEP	OBJECTIVE(S)	REQUEST STATUS	RESPONSIBLE AREA	ACTIVITIES	BUSINESS RULES
2a	Fill out ESR Form Attachment	N/A	Requested By	• Downloads ESR Form Attachment from CMS • Documents the ESR Form Attachment; ensures all required fields are completed including the authorized approver name, details about the request, name and contact information, and asset / inventory tag information (when applicable)	• Requested By is responsible for consulting with the Requested For to confirm the specific needs and Urgency, as well as review and verify contact information and asset / inventory tag(s) related to the request are correct / up to date • Requested By is responsible for identifying the necessary Task Coordinator(s) at the agency end and document into the ESR Form Attachment • Requested By is responsible to

				• Consults with the Requested For to confirm Urgency and to review that all request details, contact and Asset information are correct	complete the ESR Form Attachment with all required / accurate and detailed information in a timely manner • Requested By is responsible for keeping the Requester informed on the status of the request as needed; and to follow up with the Service Desk to request a status check on the request
2b	Email Service Desk with ESR Form Attachment to initiate opening a new service request	N/A	Requested By	• Submits an Email to the Service Desk and includes the ESR Form Attachment • Consults with Service Desk to provide additional details related to the request	• Requested By is responsible for Emailing the Service Desk the Requesters completed ESR Form Attachment (with all required / detailed / accurate information) in a timely manner • Requested By is responsible to follow up in providing any

				(when applicable) • Retains electronic or hardcopy records of request to meet agency specific policy / audit requirements	additional information or details of the request when consulted by the Service Desk (as needed)
2c	Receive new service request and reviews for accuracy / completeness	N/A	Service Desk	• Monitors the Service Desk Email queue for new service requests • Reviews new ESR Form Attachment data to ensure completeness and accuracy of information provided • Consults with Requested By (when applicable)	• Service Desk is responsible for monitoring incoming Email for new requests in a timely manner • Service Desk is responsible for the initial review and verification of details within the ESR Form Attachment(s) to ensure completeness and accuracy of information • Service Desk is responsible to ensure proper Approval name

					is documented and confirmed within every ESR Form Attachment; and to Reject / return the incomplete ESR Form Attachment to the Requested By when approver information is not provided or incorrect • Service Desk is responsible to follow up with the Requested By to request additional data / information related to the accuracy or details necessary to create a new service request (when applicable)

3. **Create a New service request (Status=New)**

Description: Service desk creates new service request in the Remedy system based on data provided by the customer in the ESR Form Attachment details. Service request is then assigned to the appropriate Shared Service support team.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
3a	Create a new change / service request in the Remedy system	NEW	Service Desk	• Creates new service request for customer based on information and detail provided in the ESR Form Attachment • Ensures all Required fields are filled in the Remedy service request detail • Updates the work-log with a new entry and saves the service request as NEW status	• Service Desk is responsible for selecting the appropriate Remedy profile name / ID for the Requested By and ensures the "Requested For" section contains the Requester For name / ID • Service Desk is responsible for reviewing the Region, Site, Department data is validated against the Name / Address / Location of the Requested For is accurate; or will ensure proper updates to Region, Site or Department is made (when

					applicable) • Service Desk is responsible for selecting the appropriate Remedy profile name / ID for the Requested By and ensures the “Requested By” section contains the Requested By name / ID • Service Desk is responsible for selecting the appropriate Remedy profile name / ID for the Task Coordinator and ensures the “Task Coordinator” section contains the Task Coordinators name / ID • Service Desk is responsible for ensuring the “Requested Date” field accurately meets the expectation to complete the

					work as identified by the customer in the ESR Form Attachment • Service Desk is responsible for ensuring all Required fields are filled in accurately in order to Save the request in a NEW status
3b	Assign the service request to the appropriate Shared Service team for support	ASSIGNED	Service Desk	• Selects appropriate Category, Type, Item (CTI) and Region, Site, Department (RSD) based on customer location and the request type • Ensures the Assignment Group is correctly selected based on CTI and RSD	• Service Desk is responsible for either selecting an appropriate “Summary” field drop-down related to the service request type (when applicable) which will automatically fill in the correct CTI data; otherwise a new Summary field is to be typed in and then manually identify the correct CTI selections related to the service

				• Attaches the ESR Form Attachment into the service request; also attaches any other pertinent / supplemental documents related to the service request • Updates the work-log with a new entry and saves the service request into Assigned status	request type • Service Desk is responsible for ensuring the correct RSD is filled in related to the Requesters location where the work is to be done at • Service Desk is responsible for ensuring the correct Shared Service team is selected within the "Assignment Group" field of the service request to ensure proper routing of the request • Service Desk is responsible for changing the Status of the service request from NEW to ASSIGNED and then Save the request to ensure the request will be routed directly to the Shared Service team for

					assignment
3c	Receive a new service request in the Shared Service team Assignment queue	ASSIGNED	Shared Service team	• Monitors all appropriate assignment queues for incoming / new service requests and reviews highest priority requests first and foremost • Reviews new service request details to ensure the request has been properly routed to correct assignment group • Routes improperly assigned tickets to their support team to the appropriate Assignment Group, or may consult with the Service Desk	• Shared Service manager (or appointed delegate) is responsible for actively monitoring their designated Assignment queues for New service requests routed to them (supported during normal M-F business hours); and to expedite highest priority requests in the queue first and foremost • Shared Service manager (or appointed delegate) is responsible to review the service request details in a timely manner to ensure the request is in the proper assignment group queue;

				for assistance	otherwise identify the correct Assignment Group or consult with the Service Desk for assistance • Shared Service manager is responsible to follow up with Service Desk to request clarification or additional details related to the service request (as needed)
3d	Provide a Cost Analysis to the Requested By for the service request (as needed)	ASSIGNED	Shared Service team	• Reviews the ESR Form Attachment and identifies if the Requested By has made an inquiry for a Cost Analysis • Provides a Cost Analysis detail back to the Requested By and	• Shared Service manager (or appointed delegate) is responsible for reviewing all information specified in the ESR Form Attachment(s) and identify any Cost Analysis inquiry be completed prior to beginning work on the service request

				updates information in the work-log (as needed)	• Shared Service manager (or appointed delegate) is responsible for providing the Cost Analysis back to the Requested By in a timely manner and document detail of the completed inquiry into the work-log of the service request Note: It is important to document details of Cost Analysis inquiry into the work-log to provide information that may result in a decision to Cancel the request

4. Update Planned Start / Planned End Dates (Status=Planning)

Description: Shared Service manager updates request with estimated Planned Start / End date based on Priority of request and Resource Assessment of available technicians.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
4a	Change the service request status to Planning and update request with Planned Start / End Dates and add Tasks (when applicable)	PLANNING	Shared Service team	• Performs a Resource Assessment of available technicians to respond to the service request • Reviews the Urgency and Requested Date expectations as specified from the customer • Determines an appropriate time frame to begin / end the request based on the	• Shared Service manager (or appointed delegate) is responsible for updating the service request with a Planned Start / End date, based on the availability of staff resources (as identified in a Resource Assessment), and also based on consideration of the customer Priority / Requested Date expectations • Shared Service manager (or appointed delegate) is

				Priority and technician resources availability • Updates service request with Planned Start / End dates and work-log entry, and saves request into Planning status	responsible for updating the work-log any time the status of the request has been changed
4b	Shared Service team seeks to revise / change the original Planned Start / End Date to a new / revised date	PLANNING	Shared Service team	• Determines work activities cannot be performed in the original Planned Start / End Date • Consults with Requested By / customer to gain mutually agreed revised Planned Start / End Date expectations • Informs the Service Desk	• Shared Service team (in general) is responsible to follow up with the Requested By immediately if the Planned Start / End date needs to be revised or changed. Only after consulting the Requested By / Customer and gaining a mutual agreement to a revised Planned Start / End Date may the request is changed to reflect the new Date. The work-log

				(when applicable) on revised planned work activities • Updates work-log to provide details that customer has been consulted and agrees to revised Planned Start / End Date	must be updated to identify the Requested By was consulted prior to making the Planned Start / End Date revision
4c	Customer seeks to revise / change the original Planned Start / End Date to a new / revised date	PLANNING	Requested For	• Informs the Service Desk on behalf of the Requester, Task Coordinator or management to request a change to the original Planned Start / End Date in the service request • Consults the Service Desk and / or Shared	• Requested By is responsible to contact the Service Desk immediately if there is a need to revise or change the original Planned Start / End Date as specified in the service request • Requested By is responsible for consulting with the Requester, Task Coordinator, Management and also with the Service Desk

				Service team on a mutually agreed upon revised / new Planned Start / End Date	or Shared Service team to come to a mutually agreed to revised / new date

5. **Adding and Assigning Tasks down to the Technician level (Status=Scheduled)**
Description: Activity to add pre-defined or new tasks, sequence the order in which the tasks are to be completed (concurrently or dependent) and assign a specific Technician to complete each task. Change status of request to Scheduled when all tasks are added, assigned to a technician, and sequenced properly.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
5a	Add in pre-defined or new Tasks to the service request- and if necessary, sequence the order in which tasks may be completed	PLANNING	Shared Service team	• Identifies all work related tasks necessary to complete the service request details • Determines order in which work tasks must be sequenced (concurrent work or	• Shared Service manager (or appointed delegate) is responsible to add in tasks for any service request with work tasks that are to be completed by more than one technician within their specific team, or work tasks that may be

				dependent upon a task) • Identifies the technician responsible for completing each specific work task • Includes Tasks and related Attachments to accommodate up to and no more than 10 Asset moves per one service request • <u>Note:</u> It is a recommended best practice to group by location (RSD) or by deployment date (planned start / end) for service requests that are used for up to 10 Asset	dependent upon additional / other shared service teams (Required) • Shared Service manager (or appointed delegate) is responsible for selecting from available pre-defined task lists or by manually adding in any new tasks specific to the work necessary to complete the service request • Shared Service manager (or appointed delegate) is responsible for making a determination of how work tasks are to be ordered / sequenced. Concurrent work tasks may share the same sequence number; dependent

				related moves within one request	work tasks must be numbered higher than tasks that must be completed first. Sequencing tasks is only necessary when applicable. • Shared Service Team is responsible for allowing up to and no more than 10 (maximum) Asset moves to be assigned and tracked within one service request, and to include specific details on all Assets in the Attachment section (Required)
5b	Assign a specific technician to each Task that has been added into the service request	PLANNING	Shared Service team	• Identifies a technician to carry out the completion of a work task associated to the service request	• Shared Service manager (or appointed delegate) is responsible for assigning task level work to a specific technician and provide any

				• Updates the work-log with additional notes, instructions for the technician to follow • Ensures a final task at the end of every service request is added to review and verify completion of the request with the customer	additional data in the attachments or work-log • Shared Service manager (or appointed delegate) is responsible to add in a pre-defined final task to ensure a QA follow up and review of the completion and quality of work with the customer (either the Requested By or Task Coordinator) in every single request – (Required)
5c	Change the status of the service request to Scheduled to initiate the start of work task activities for assigned technicians	SCHEDULED	Shared Service team	• Updates the work-log with a new entry and saves the service request into Scheduled status	• Shared Service manager (or appointed delegate) is responsible for changing the status of any service request with assigned tasks into a status of Scheduled when the request is ready to begin work

					tasks. • Note: Auto-notification to the technician of assigned tasks will not commence until the request is moved into a Scheduled status.

6. **Completing Task Work Assignments (Status=Work In Progress)**
Description: Task assignments are being worked on by the technician and the service request status will remain in Work In Progress until the last task is completed. Service requests with no Tasks associated may skip the Scheduled status and move directly to Work In Progress.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
6a	Technician will receive a notification message from Remedy to begin work on their assigned Task(s) and will move Task status into Work In Progress while attending to the completion of work tasks. Note: The overall	WORK IN PROGRESS	Shared Service Technician	• Reviews the Remedy console for new / assigned Task work, and / or reviews incoming Email notification to check Remedy console for new / assigned Task work	• Shared Service Technician is responsible for pro-actively checking in the Remedy system any new Tasks that have been assigned; or may also rely on Email notification from Remedy of new Tasks that have been assigned. Technician must always review all data within

	request status of the service request will automatically move to Work In Progress status when the first Task scheduled is changed to Work In Progress.			• Reviews service request details in the Remedy fields and within the ESR Form Attachment • Identifies all work tasks to be completed, updates work-log and changes status of service request to Work In Progress • Consults and works with agency Task Coordinator to verify or confirm details of the service request	the Remedy service request prior to working on a new task. • Shared Service Technician is responsible to perform a detailed review of all service request data in the Remedy ticket and should not solely rely on an Email notification to begin task work activities. Work-log entries are required to complete tasks before the service request can be saved. • Shared Service Technician is responsible to change the status of the service request to Work In Progress before the work activity is to be performed and should not delay this activity until after the work

					activity is completed. • Shared Service Technician is responsible for consulting with the Task Coordinator in requesting additional details related to the service request (when applicable)
6b	Technician completes a specific task (or multiple concurrent tasks) and changes status of Task from Work In Progress to Closed. If multiple tasks are sequenced, the first task completed will trigger the next sequenced task in line to begin.	WORK IN PROGRESS	Shared Service Technician	• Updates the work-log and changes Task status to Closed when each of the triggered sequence of work tasks are completed	• Shared Service Technician is responsible for assigned Task work is accurately performed and completed in a timely manner • Shared Service Technician is responsible for updating the work-log and ensuring the Task status is Closed upon completion of work activity, to allow a smooth transition of

					successor Tasks
6c	Shared Service manager may assign a request to be completed by one technician based on a single work activity and no related Tasks to be added or Scheduled. Technician can change the request status to Work In Progress to perform Task-less work activities.	WORK IN PROGRESS	Shared Service Manager	• Consults with a single technician to perform all work activities in the service request without adding and assigning Tasks • Changes status of the service request from Planning into Work In Progress and may bypass the Scheduled status (when applicable)	• Shared Service manager (or appointed delegate) is responsible to update the work-log and provide specific work activity information for a single Technician to complete. • Shared Service manager (or appointed delegate) is responsible for consulting directly with the Technician before changing the status of the request to Work In Progress, due to lack of auto notification and triggering status.

7. Placing a Service Request into a Pending state (Status=Pending)

Description: When necessary, a service request can be placed into a Pending / hold status by the Service Desk based on input from the Customer or Shared Service team.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
7a	Customer may optionally contact the Service Desk to have the service request placed into a Pending status	ASSIGNED / SCHEDULED	Requested By	• Identifies a need to not outright cancel, but to place an opened service request into Pending (or Hold) status	• Agency Requested By is responsible for contacting the Service Desk to inform of a need to place the service request into a Pending status (when applicable)
7b	Shared Service team consults with Service Desk to follow up with the Requested By on the need to place the request into a Pending status	ASSIGNED / SCHEDULED	Shared Service team	• Identifies a need to place an open service request into a Pending status • Consults the Service Desk to assist in follow up with the Requested By to place the request	• Shared Service team is responsible for identifying when circumstance arises where the request must be held, to seek assistance of the Service Desk to follow up with the Customer • Shared Service team is

				into a Pending status	responsible for providing detailed information to the Service Desk as to the reason or circumstances related to placing an open request into a Pending status
7c	Service Desk updates the service request to reflect customer needs and changes status into Pending	PENDING	Service Desk	• Updates the work-log and changes status of service request to Pending • Informs the Shared Service Assignment group or Manager of the Pending status reason (Optional)	• Service Desk is responsible for identifying the Pending reason code, updating the work-log and saving the service request into a Pending status • Service Desk is responsible to help follow up with the Assignment Group based on expectations from the customer (when applicable)

8. Performing a customer Escalation relating to a Service Request (Status=Scheduled, Pending or Work In Progress)

Description: Customer calls the Service Desk and requests an Escalation to an open Service Request

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
8a	Task Coordinator or Requested By calls on behalf of the Requester to the Service Desk and asks to speak to a Service Desk Supervisor to request an Escalation of the Service Request	SCHEDULED PENDING WORK IN PROGRESS RESOLVED	Requested By	• Consults with Requester to determine a need to request an Escalation • Contacts the Service Desk and asks to speak to a Service Desk Supervisor to request an Escalation relating to a Service Request in Scheduled, Pending, Work In Progress, or Resolved status • Provides details or justification to the Service Desk on the	• Task Coordinator or Requested By is Responsible for contacting the CMS Service Desk to initiate the Escalation of a service request • Task Coordinator or Requested By is responsible for providing information, details and / or justification relating the business need to perform an Escalation for the service request • Task Coordinator or Requested By is responsible to initiate the Escalation while the service

				nature of the Escalation	request is in either a Scheduled, Pending, Work In Progress or Resolved status. • Note: When the request is in CLOSED Status, the request cannot be re-opened. A New service request or an Incident should be opened and related to the Closed service request.
8b	Service Desk performs an Escalation on behalf of the customer to the Shared Service Manager of the Assigned Group associated to the service request	SCHEDULED PENDING WORK IN PROGRESS RESOLVED	Service Desk Supervisor	• Consults with Task Coordinator or Requested By to determine the need or scope of Escalating the request • Determines the Action Items that are mandatory to complete in follow up with the	• Service Desk Supervisor is responsible for consulting with the Task Coordinator or Requested By and will determine if the need to set an Escalation is necessary • Service Desk Supervisor is responsible for changing the Priority and Urgency in the service request to Urgent if

				Customer • Changes the Priority and Urgency or the Service Request to Urgent • Changes the Escalated field in the Service request from No to Yes • Contacts the Assignment Group Manager or Supervisor and identifies all Action Item follow up steps with the customer	there is an Escalation • Service Desk Supervisor is responsible for changing the Escalated field from No to Yes in the service request • Service Desk Supervisor is responsible for contacting the Assignment Group Manager or Supervisor directly to consult with them on the details and to set expectations on the Action Item follow up with the Customer • Service Desk Supervisor is responsible for entering into the work-log all details in the steps required to satisfy the customer into the service

					request
8c	Shared Service Manager is provided details on the customer Escalation of a service request and performs all follow up Action Items as established by the Service Desk Supervisor	SCHEDULED PENDING WORK IN PROGRESS RESOLVED	Shared Service Manager	• Informed by Service Desk Supervisor on the details of an Escalated service request • Completes all Action Items in follow up with the Customer as identified by the Service Desk Supervisor	• Shared Service Manager is responsible for reviewing the details of the service request and taking immediate steps to perform Action Item follow up in response to the Escalation • Shared Service Manager is responsible for contacting the Task Coordinator or Requested By, and provides details on the necessary steps taken to Resolve the Escalated service request • Shared Service Manager is responsible for ensuring work-log details are documented after all Resolution steps are

					completed • Shared Service Manager is responsible to ensure the service request is Resolved in a timely manner as specified by the Service Desk Supervisor

9. Creating a new Asset record related to a Service Request (Status=Work In Progress)

Description: Shared service technician adds any new Assets that are identified in relation to a service request.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
9a	Technician identifies all Assets related to the service request and verifies an existing Asset is available, otherwise will create a new Asset record for the Configuration Item (CI)	WORK IN PROGRESS	Shared Service Technician	• Identifies all Asset items that are related to the service request • Verifies in Remedy that an Asset record exists for all CI's related to the service request	• Shared Service Technician is responsible for identifying all the CI / Assets related to the service request and verifying that an Asset record exists for each item • Shared Service Technician is responsible for creating a new

				• Creates a new Asset record(s) for any applicable CI's related to the service request	Asset record for any CI / Asset that is not identified

10. Relating Assets to a Service Request (Status=New, Work In Progress)

Description: Shared service technician relates all associated Asset(s) to a Service Request

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
10a	Service Desk identifies affected Asset / Configuration Item (CI) related to the service request and manually creates a new Relation of the Asset to the Service Request	NEW	Service Desk	• Identifies all related Assets for customer and will Relate the Asset(s)to the service request (when applicable) • Note: Not all assets may be identified at the initiation of a service request	• Service Desk is responsible for reviewing the detail within the ESR Form Attachment to identify all Asset information that would be related to the service request (when applicable) • Service Desk is responsible for adding a new Relate record, tying the Asset(s) to the Service

					Request. (when applicable)
10b	Shared Service Technician identifies new or additional Asset / CI related to the service request and creates a new Relation of the Asset(s) to the Requester.	WORK IN PROGRESS	Shared Service Technician	• Identifies new or additional Assets related to service request • Consults with Task Coordinator to identify details of the Asset information • Creates new Asset relationship to the Service Request	• Shared Service Technician is responsible for ensuring all Asset / CI's related to the customer are all Related to the service request • Shared Service Technician is responsible for reviewing any Asset item as identified by the Service Desk and verify the Asset information is correct
10c	Shared Service Technician identifies new or additional Asset / CI related to the service request and creates a new Relation of the Asset(s) to the service request	WORK IN PROGRESS	Shared Service Technician	• Identifies new or additional Assets related to service request • Consults with Task Coordinator to identify details of the Asset	• Shared Service Technician is responsible for ensuring all Asset / CI's related to the customer are all Related to the service request • Shared Service Technician is responsible for reviewing any

				information • Creates new Asset relationship to the Service Request	Asset item as identified by the Service Desk and verify the Asset information is correct

11. Relating Assets to the Requested For (end user) (Status=Work In Progress)

Description: Shared service technician associates all identified CI's related to the service request and Associates to the Requester

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
11a	Shared Service Technician relates all Assets associated to the Requester as identified in the service request	WORK IN PROGRESS	Shared Service Technician	• Creates or Updates relationship to the Requested For with all identified Assets in the service request	• Shared Service Technician is responsible for associating all identified Assets related to the service request to the Requester • Shared Service Technician is responsible for updating, revising or creating a new Asset relationship to the Requested

					For (as required)

12. **Relating multiple dependent (or non-dependent) Service Requests together (Status=Work In Progress)**
Description: Service desk or the Shared Service Team relates multiple service requests together

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
12a	Identify all associated service requests and create a relation dependency (as needed)	SCHEDULED WORK IN PROGRESS	Shared Service Team	• Identify all service requests that would be related to each other, and identify if dependency is required • Identify the order of sequence any dependent service requests are related (as needed) • Note: It is a recommended best practice to group by	• Shared Service Team is responsible for relating multiple service requests together (as needed) • Shared Service Team is responsible for establishing a sequence order for all related service requests (as needed) • Shared Service Team is responsible for Resolving all related Service Requests in the related / sequenced order that has been established

				location (RSD) or by deployment date (planned start / end) for service requests that are used for up to 10 Asset related moves within one request	• Shared Service Team is responsible for allowing up to – and no more than 10 (maximum) Asset moves to be assigned and tracked within one service request, and to include specific details on all Assets in the Attachment section (Required)

13. Service Request Close-Out Activities (Status=Resolved)

Description: Shared service technician completes all related activities and Resolves the last Task of a request

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
13a	Technician ensures all work activity has been completed and status for each task has been Closed	RESOLVED	Shared Service Technician	• Completes all work activity, updates the work-log and changes status for all assigned Task(s) to Closed	• Shared Service Technician is responsible for providing updates the work-log and changes status of each assigned Task to Closed
13b	Technician ensures all work activity for service requests with no assigned Tasks have been completed, and manually changes the Status of the request to Resolved	RESOLVED	Shared Service Technician	• Updates the work-log and changes status of service request to Resolved	• Shared Service Technician is responsible for all work activity and necessary customer follow-up to verify completion of the service request before changing the status of the request manually to Resolved. • Shared Service Technician is responsible to identify if the customer would like to perform

					a Cost Analysis related to the service request and to ask to open the inquiry by calling the Service Desk

LOGGING IN

1) From the Desktop, click the Internet Explorer icon. The Illinois.gov Home Page will display OR change the URL to display it.

2) http://ITSM.illinois.gov/arsys/home

3) After the Remedy Home Page displays make a Favorite

4) Explorer Settings

5) From the Remedy Home Page select Tools from the Internet Explorer menu. A submenu will display.

6) From the submenu, select Internet Options. A submenu will display.

7) From the submenu, under the Temporary Internet Files section, select Settings.

8) In the Settings section, select Every visit to the page.

9) Click the OK button. You will be returned to the previous screen.

10) Click the OK button to dismiss the screen. You will be returned to the Remedy Home Page.

Create Favorite

The following steps only need to be done the first time you log in to Remedy.

1) Go to the Remedy Home Page.

2) Click the Favorites option from the menu bar that displays at the top left of the screen.

3) A submenu will display.

4) From the submenu, select Add to Favorites.

5) An Add Favorite dialog box will display.

6) In the Name field, enter a name for your favorite – for example: Remedy Login – Remedy 6.0.

7) Click the OK button to save your entry.

8) The dialog box will disappear and you will be returned to the Remedy Home Page.

9) Once your favorite has been saved, you can use it to log in to Remedy.

10) From the Desktop, click the Internet Explorer icon.

11) The Illinois.gov Home Page will display.

12) From the Illinois.gov Home Page, click the Favorite menu option at the top of your screen.

13) A list of favorite sites will display.

14) Locate and click on the Remedy login favorite you created.

15) The Welcome Screen will display.

Enter your User Name and Password, and click the Login button.

The Remedy Home Page will display.

- Type in User Name and Password to take you to the Remedy Home Page

LOGGING IN FROM THE CLIENT VERSION OF REMEDY

From the Desktop click the Remedy Icon

1) On the Login—"Remedy User" window (Populate User Name)
2) Password is set to default to same as User Name
3) Preference Server ITSMX.ILLINOIS.GOV (Server for production As of July 1 2007)
4) Port set to 13697
5) Do not populate Authentication
6) Click Ok

REMEDY HOME PAGE

1) Select Remedy Support Link

2) Select Setting Preferences for Setup Personal Settings

3) Under the General Tab

4) Select Open Selection from the Create Request Action Pull Down Menu

5) Select Open Selection from the Search for Request Action Pull Down Menu

6) Click the Save Button then the Close Button

7) Select Tools Menu> Options

8) Select Confirmation Tab > Choose After Creating a New Request box

9) Click OK

USING THE MANAGEMENT CONSOLE

The Management Console is the primary interface for the Remedy Management application. It provides quick access to the information you need and to the procedures that you perform most often.

MANAGE REQUESTS TABLE

The Manage Requests table lists different types of requests. These requests are identified by their prefix:

1) **CHG** identifies Change Requests.
2) **TSK** identifies tasks for either Change Requests or help desk cases.
3) **HD** identifies help desk cases. Remedy Help Desk must be installed for you to be able to create and view help desk cases.

You can change the table display by selecting different values in the Show field and the Console View field. The requests that are displayed in the table will be qualified by both field values. In a few situations where the Console View field is not applicable, the value you choose in the Show field will disable the Console View field.

THE CHOICES FOR THE CONSOLE VIEW FIELD ARE:

1) Myself - Shows all the requests that are assigned to you.
2) Group - Shows all the requests that are assigned to your support group. If you belong to more than one support group, the requests for all those groups will be displayed.

3) Unassigned - Shows all the requests that are unassigned.
4) Other Agent - Allows you to select another person in your support staff and display their requests.
5) Date - Allows you to specify a Requested Completion Date. All requests that have a Requested Date prior or equal to that date are displayed in the table.
6) Any - Shows all tickets. The only qualification to the requests that are displayed in the table is the value in the Show field.

THE CHOICES FOR THE SHOW FIELD ARE:

1) Escalated Requests - Lists all requests that have been escalated.
2) Urgent Requests - Lists all requests that have urgent priority.
3) High Requests - Lists all requests that have high priority.
4) SLA Escalations - Lists all requests that are nearing the time when they will miss their service level agreements.
5) Requests Assigned To - Causes a dialog box to appear where you can enter or select a person's name to view a list of all requests assigned to that person.
6) All Open Requests - Lists all requests that have not been resolved or closed.
7) Solutions to Approve - Lists all solutions that you are requested to approve for help desk cases. If you do not have Remedy Help Desk installed, no items are listed in the table.
8) Reassignment Requests - Lists all requests that you have been asked to reassign.
9) Responded to Surveys - Lists all the surveys that requesters completed after their help desk cases were resolved. If you do not have Remedy Help Desk installed, no items are listed in the table.
10) My Pending Approvals - Lists all the Change Requests that are awaiting your approval.
11) All Pending Approvals - Opens a dialog box where you can select Change Requests that are currently awaiting approval.

12) VIP Requests - Lists all the Change Requests in which the requester has been defined as a VIP in their record.

13) In the More Information area, details of the selected request in the table are displayed. The details you see will vary slightly depending on what type of request is highlighted. If there are more entries than can be shown in the table, you can see the next grouping of entries by clicking the right mouse button and choosing Next (or Prev) on Windows. On the Web, use the arrow keys at the top corner of the table.

14) You can view requests and refresh the table. You can also create new requests by clicking the Create button above the table.

BULLETIN BOARD

The Bulletin Board on the lower portion of the console enables you to view and create messages that can be viewed by the entire organization or by users in the support, approval, management, and administrator groups. You can access the Bulletin Board from the Support Console, Approval Console, Management Console, or from within a Change Request.

Note: The Bulletin Board should only be used by Management. When a Bulletin Board is set to send to Support everyone that is listed in their profile as Support=Yes, will receive an E-mail, this may be hundreds of people. The action of creating a Bulletin Board should be used only in Emergency Situations.

FLASHBOARDS

The flashboards on the right side of the console graphically convey information to help you monitor the requests in your system. These flashboards include all open Change Requests, tasks, and help desk cases (if Remedy Help Desk is installed). The flashboards will change depending on the value in the Console View field.

1) The All Open Requests by Priority flashboard displays the requests by their priority.

2) The Escalated Cases flashboard shows the number of escalated requests versus the number of requests that are not escalated.
3) The By Group flashboard shows the number of requests assigned to each support group.
4) The By Category flashboard shows the number of requests in each category.
5) The date and time below the flashboards indicate when the flashboards were last refreshed. You can use the Refresh button to reload the data into your flashboards so you have the latest data.

QUICK LINKS

The left pane on the console is the navigation pane. The links that are displayed in the navigation pane are determined by the applications that are installed in addition to Remedy Change Management.

1) Create Request - Allows you to create a new Change Request.
2) Search for Request - Allows you to search for existing requests.
3) Search Task - Allows you to search for existing tasks and Work Order information.

   To Search for a Task do the following:

   At the Remedy Management Console Click Search Task

   If you are Searching for anything related to a Work Order the Work Order Field must be set to Yes

   The Work Order Tab is now available and may be searched
4) Create Service - Allows you to create a new service record. This link is hidden if you have Remedy Asset Management or Remedy Help Desk installed with Remedy Change Management.
5) Search for Service - Allows you to search for an existing service record. This link is hidden if you have Remedy Asset Management or Remedy Help Desk installed with Remedy Change Management.

4) Track Assets - Allows you to display the Manage Asset Information dialog box if you have Remedy Help Desk or Remedy Asset Management installed.

5) Manage SLAs - Allows you to display the SLA Main Configuration Console, from which you can review, create, and modify SLA definitions. You must have the Remedy Service Level Agreements application installed to have this capability.

OTHER

The navigation pane also contains the following links:

6) Reports - Allows you to generate predefined reports on Change Requests. You can view them with the built-in Crystal Reports viewer from Business Objects.

7) Reminders - Enables you to create notes for yourself and others. You can send them by email or through Remedy Alert, and you can specify when they will be sent.

8) Preferences - Allows you to set your personal preferences and options. You can:
   Modify your personal record.
   Determine the forms that appear if you begin creating a new request.
   Determine the forms that appear when you search for an existing request.
   Specify paging criteria that determines how and when you are notified of request assignments by being paged.

9) Approval Console - Allows you to search for Change Requests that require your approval or ask for more information about proposed Change Requests.

HELP

The Help button is located in the top right corner of the console. Click the Help button to access help.

LOGOUT

This applies to the Web only. Click the **Logout button to log out** of the Remedy application.

SETTING PREFERENCES

The **Preferences** settings allow the user to control the view of the form that will be displayed when the user selects the **New Request** quick link or the **Search for Request** quick link on the **Management Console**. Additionally it may be used to define custom paging requirements for specific types of requests.

Custom paging options are NOT used at this time.

To set preferences, from the **Management Console**:

Select the **Preferences** quick link. The **Setup Personal Preferences** dialog form will display.

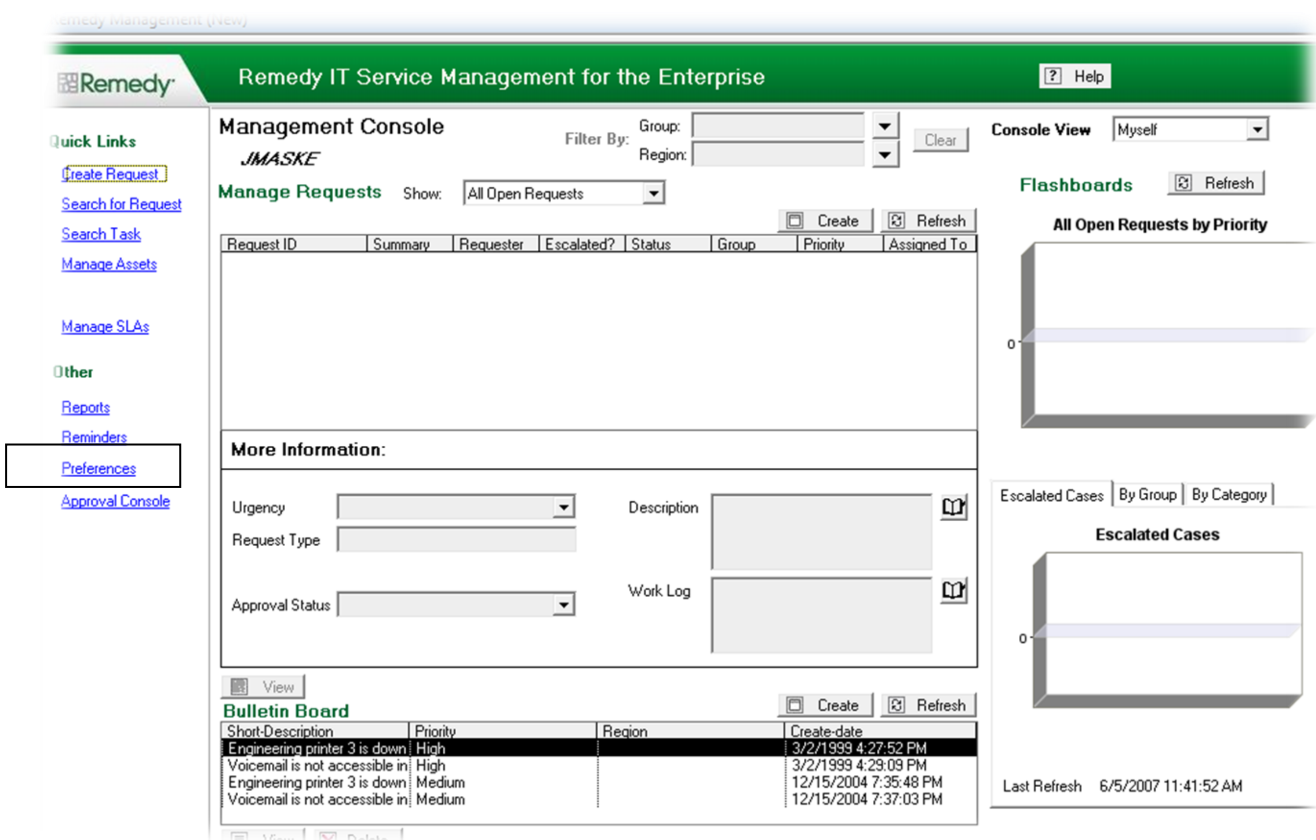
On the **Setup Personal Preferences** dialog form, the **Login Name*** field will default to display the name of the logged in user. This information cannot be changed. Users may only change their own preferences.

In the **New Request Action** and in the **Search For Request Action** fields, select the pull-down menu. The following options will display:

- Open Front Line Support Dialog – This option is NOT used at this time.
- **Open Help Desk Module** – Using this option takes you directly into the Help Desk form.
- **Open Change Tasking Module** – Use this option for Selecting and Assigning Pre-defined Tasks.
- **Open Selection Dialog** – Using this option opens a second form from which you can select which work area you would like to access.
- **Open Provisioning Module** – Using this option takes you directly into the PBC form.

From the menu, select the option that best facilitates your work responsibilities.

Select the **Save** button to save your settings. A confirmation message will appear on the screen. Select **OK** to clear the message. Select the **Close** button to return to the **IT Service Management Console**.



REMEDY SETTINGS

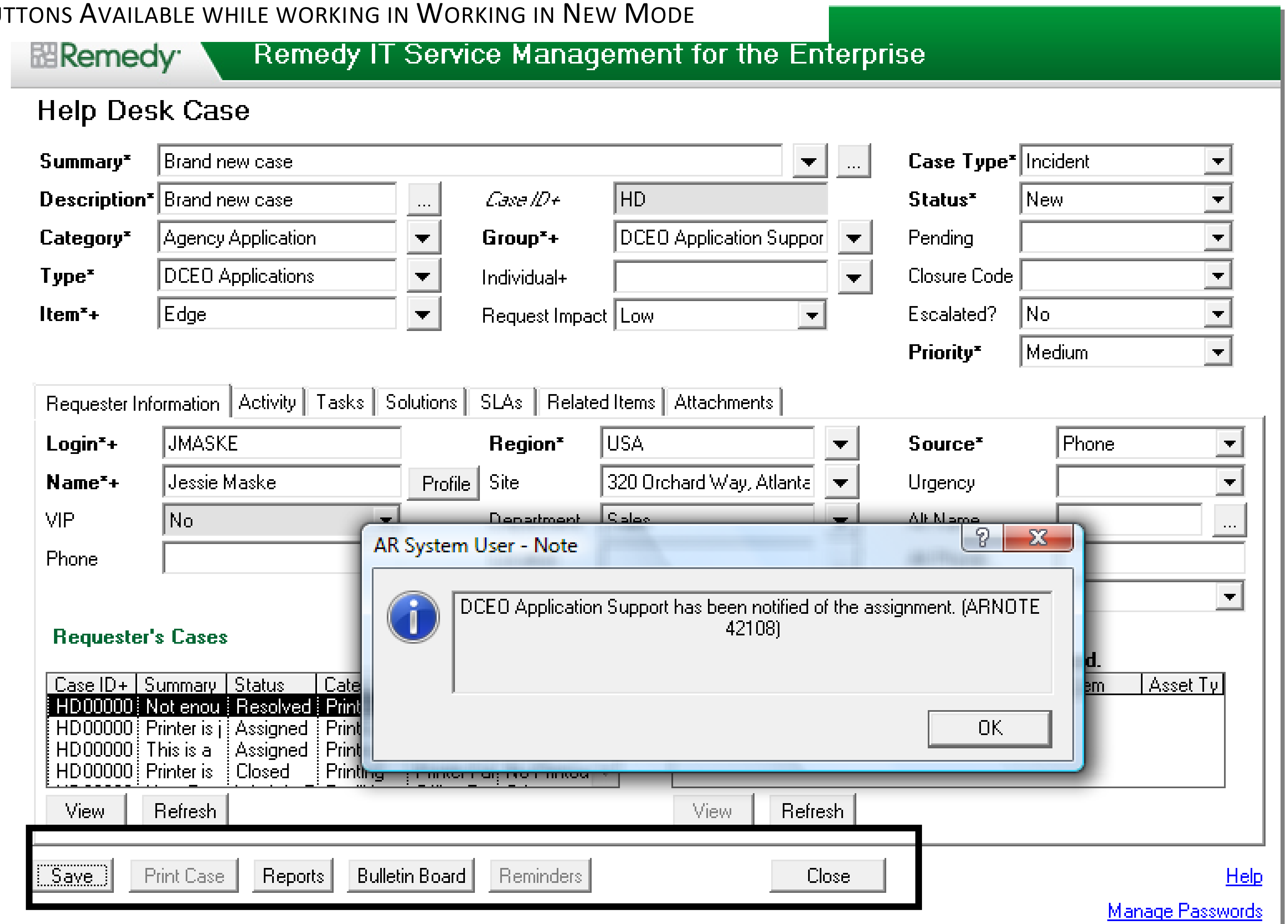
NAVIGATING WEB FORMS

NAVIGATION BUTTONS

- The navigation buttons at the bottom of the Help Desk form may be used to perform automated functions such as moving from a new window to a search window or printing a request. The buttons that are displayed will depend on the “mode” of the form that the user is working in.

- If a user is working in NEW mode the following buttons will display:

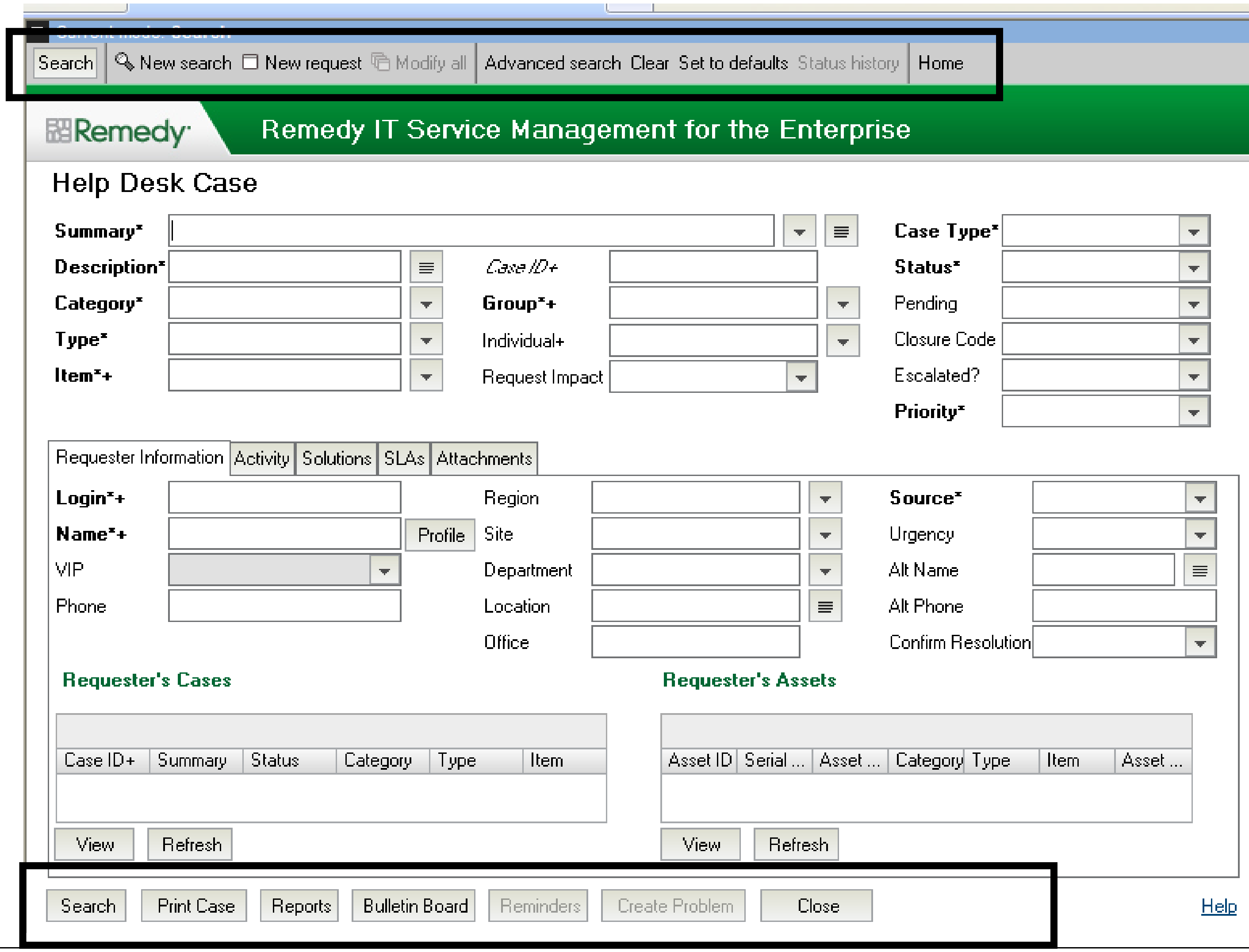
BUTTONS AVAILABLE WHILE WORKING IN WORKING IN NEW MODE



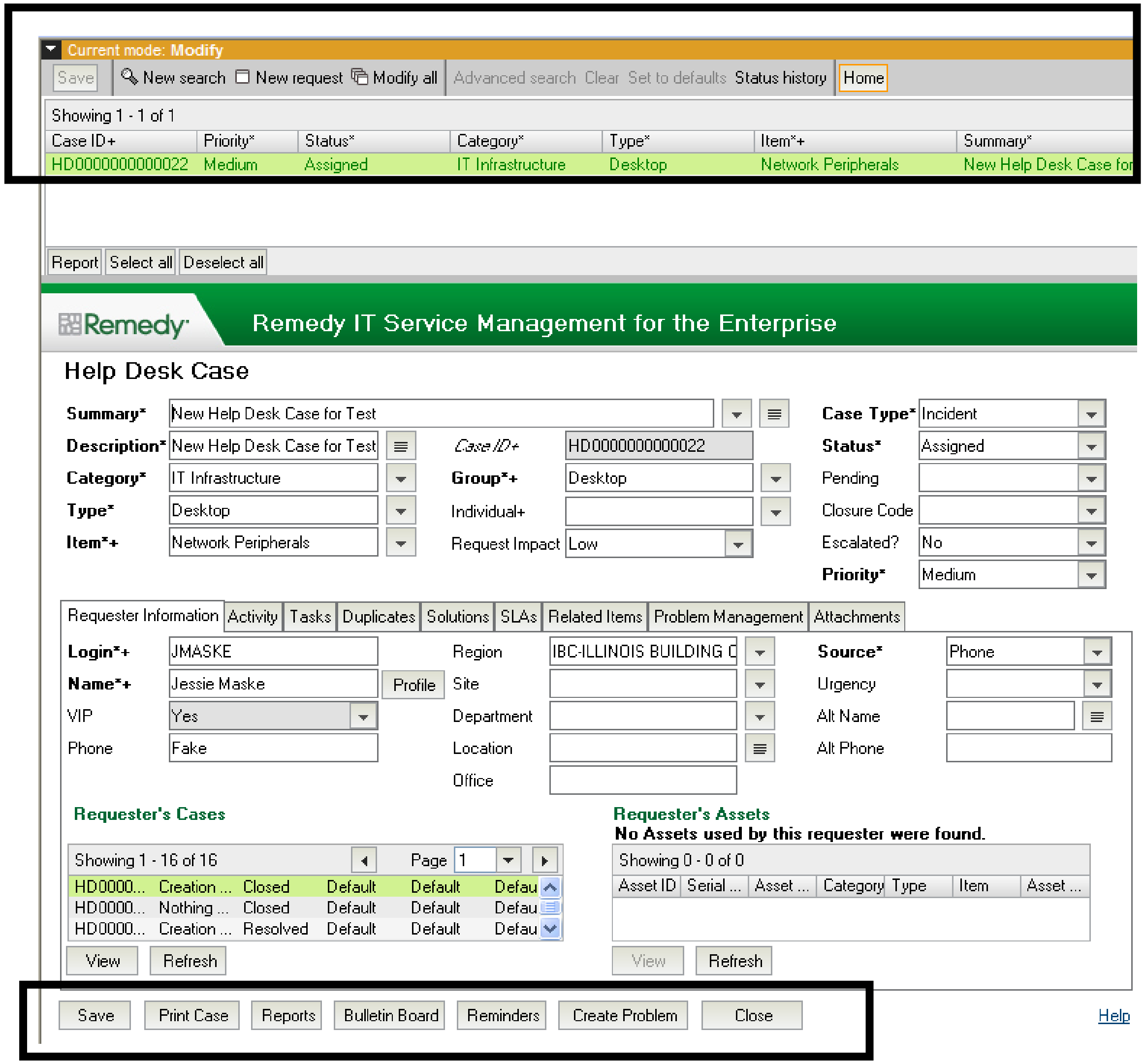
IF A USER IS WORKING IN SEARCH MODE, THE FOLLOWING BUTTONS WILL DISPLAY:

Working in

Search Mode



Working in Modify Mode



SEARCHING FOR HELP DESK CASES

The help desk cases and change requests that are assigned to you are automatically listed in the Support Console.

When you perform a search for a case, the form that appears depends on what you selected in the Search For Request field. See Setting New Request and Search for Request Action preferences for more information. The following procedure assumes that you selected the Open Selection Dialog option as the default Search For Request Action preference.

To search for a help desk case

1) On the Support Console, click the Search for Request Quick Link.
2) In the dialog box that appears, select Help Desk Case.
3) The Help Desk Case form appears.
4) Fill in the appropriate fields with the criteria to define your search.
5) To use the advanced search bar, choose View > Advanced Search Bar.
6) A row of buttons, a Search Criteria field, and a Fields button display.

7) You can use this bar to specify complex search criteria. For detailed information about using the advanced search bar, see Remedy User Help. To access Remedy User Help, click the Help link, press the F1 key, or choose Help > Contents and Index.

8) Click Search.

9) The requests matching the search criteria display in the Results pane.

10) To view the details of a help desk case, double-click on the item in the list.

11) The case appears in the Details pane.

12) To view your group's open cases in Windows

13) On the Support Console, click the Search for Request Quick Link.

14) In the dialog box that appears, select Help Desk Case.

15) The Help Desk Case form appears.

16) Choose Actions > Defined Searches > List Group's Open Cases.

17) Your group's open cases display in the Results pane.

18) To view the details of a help desk case, select it, and click View, or double-click it.

19) To view your group's open cases on the Web

20) On the Web Support Console, click Search for Request.

21) In the dialog box that appears, select Help Desk Case.

22) The Help Desk Case form appears.

23) From the blue and gray button bar above the Help Desk Case form, click Advanced Search.

24) Enter the following information in the Advanced Search field:

25) `Group+' = "<your_group>" AND `Status' < "Resolved"

    Note: For best results when creating an Advanced Search formula, use the buttons and field menus that the Advanced Search bar provides as much as possible. Advanced Search formulas are very precise, and typing formulas manually can lead to errors-often very small ones that can be difficult to find.

26) From the blue and gray button bar above the Help Desk Case form, click Search.

27) Your group's open cases are listed in the table below the Help Desk Case form.

28) To view the details of a case, select it, and click View, or double-click the case in the list.

29) To view your own open cases in Windows

30) On the Support Console, click Search for Request.

31) The Help Desk Case form appears.

32) Choose Actions > Defined Searches > List My Open Cases.

33) Your open cases display in the Results pane.

34) To view the details of a help desk case, select it, and click View, or double-click it from the listing.

To view your own open cases on the Web

1) On the Support Console, click Search for Request.

2) In the dialog box that appears, select Help Desk Case.

3) The Help Desk Case form appears.

4) From the blue and gray button bar above the Help Desk Case form, click Advanced Search.

5) Enter the following information in the Advanced Search field:

6) `Individual+' = "<your_name>" AND `Status' < "Resolved"

   Note: For best results when creating an Advanced Search formula, use the buttons and field menus that the Advanced Search bar provides as much as possible. Advanced Search formulas are very precise, and typing formulas manually can lead to errors-often very small ones that can be difficult to find.

7) From the blue and gray button bar above the Help Desk Case form, click Search.

8) Your group's open cases are listed in the table below the Help Desk Case form.

9) To view the details of a case, select it, and click View, or double-click the case in the list.

SEARCHING FOR REQUESTS

The help desk cases and change requests that are assigned to you are automatically listed in the Support Console. You can also search for and view any requests that your administrator has given you access to, including those not assigned to you.

To have the Search Change Requests form appear, you may need to set your personal preferences and select the Open Change Tasking Module option in the Search For Request Action field. See Setting New Request and Search for Request Action preferences for more information. The following procedure assumes that you selected the Open Change Tasking Module option as the default Search For Request Action preference.

To search for a request

1) On the Support Console, click the Search for Request Quick Link.

2) The Select Request Type dialog box appears

3) In the Select Request Type dialog box, click Change Request.

4) The Change Request Information form appears.

5) Fill in the applicable fields with the criteria by which you want to define your search.

6) Click Search.

7) In Windows, the requests matching the search criteria are displayed in the Results pane. The selected request is shown in the Details pane.

8) On the Web, the matching requests are listed in a table at the bottom of the form.

9) To view the details of another change request, click on the request in the list.

10) The change request appears.

To view your group's open change requests in Windows

1) On the Support Console, click the Search for Request Quick Link.

2) The Select Request Type dialog box appears

3) In the Select Request Type dialog box, click Change Request.

4) The Change Request Information form appears.

5) Choose Actions > Defined Searches > List Group's Open Changes.

6) Your group's open change requests are displayed in the Results pane.

7) To view the details of a change request, click on the item in the list.

8) The request appears.

To view your group's open change requests in the Web

1) On the Web Support Console, click Search for Request.

2) The Select Request Type dialog box appears

3) In the Select Request Type dialog box, click Change Request.

4) The Search Change Requests form appears.

5) In the blue-gray button bar at the top of the form, click Advanced Search.

6) The advanced search bar appears at the bottom of the form.

7) Enter the following in the Advanced Search field:

8) `Group+'= "<your_group_name>" AND `Status' < "Resolved"

   Note: For best results when creating an Advanced Search formula, use the buttons and field menus that the Advanced Search bar provides as much as possible. Advanced Search formulas are very precise, and typing formulas manually can lead to errors-often very small ones that can be difficult to find.

9) Click Search.

   The matching requests will be listed in the table at the bottom of the form.

   If you need to, scroll through the list, or click the Next link above the table to view more entries.

10) To view a request, click in the row for the request you want to view.

11) To view your open change requests in Windows

12) On the Support Console, click Search for Request.

13) The Select Request Type dialog box appears

14) In the Select Request Type dialog box, click Change Request.

15) The Search Change Requests form appears.

16) Choose Actions > Defined Searches > List My Open Changes.

17) Your open change requests are displayed in the Results pane.

18) To view the details of a change request, click on the item in the list.

19) The request appears in the Details pane.

20) To view your open change requests on the Web

21) On the Web Support Console, click Search for Request.

22) The Select Request Type dialog box appears

23) In the Select Request Type dialog box, click Change Request.

24) The Search Change Requests form appears.

25) Click Advanced Search.

26) The advanced search bar appears.

27) Enter the following in the Advanced Search field:

28) `Supervisor+'= "<your_name>" AND `Status' < "Resolved"

29) Click Search.

    The matching requests will be listed in the table at the bottom of the form.

    If you need to, scroll through the list, or click the Next link above the table to view more entries.

30) To view a request, click in the row for the request you want to view, and click View.

CLIENT NAVIGATION OPTIONS

- If you are accessing Remedy through the Client, there are multiple methods of performing automated functions such as moving from a new window to a search window, or printing a request.

Hot Keys	Description
F2	Displays a form in the Create mode (New).
F3	Displays a form in the Search mode.
F5	Refreshes the contents of a table field or a search window.
CTRL + Enter	Saves a request.
CTRL + E	Clears all displayed and un-displayed field entries, including Administrator defined defaults.
CTRL + F4	Closes the current window.
CTRL + A	Performs a Copy All. Use this function to copy an existing request. When used, Copy All copies all field entries from the existing request except the Case ID number and the Work Log information. Copy All should not be used to copy CLOSED requests. When Copy All is used you will need to use the menu option “Paste All” to place the copied information into a New mode of the selected form

OPTION 3 – MENU SELECTIONS

File Menu	Options are: Open, Close, Close All, Send, Print, Recent New Forms, Recent Search Forms, Recent Requests, Recent Entry Points
Edit Menu	Options are: Cut, Copy, Paste, Clear, Copy All, Paste All, Clear All, Copy to New, Set to Defaults
View Menu	Options are: Tool Bar, Status Bar, Macro Bar, Advanced Search Bar, Prompt Bar, Pane Layout, Details, Results, Status-History, Auto – Refresh Refresh Search
Tools Menu	Selections under this menu should not be used at this time.
Actions Menu	Options are: Save, Search, Save and Next, New Request, New Search, Save Search, Defined Searches, My Searches, Recent Searches, Modify All

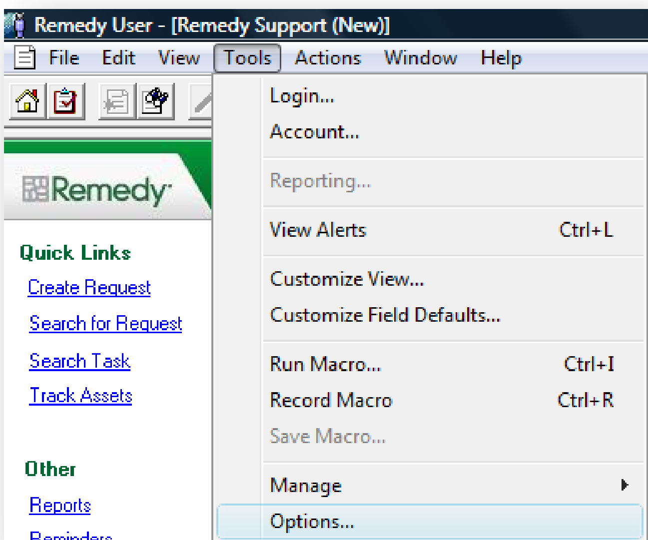
OPTIONS SET IN CLIENT

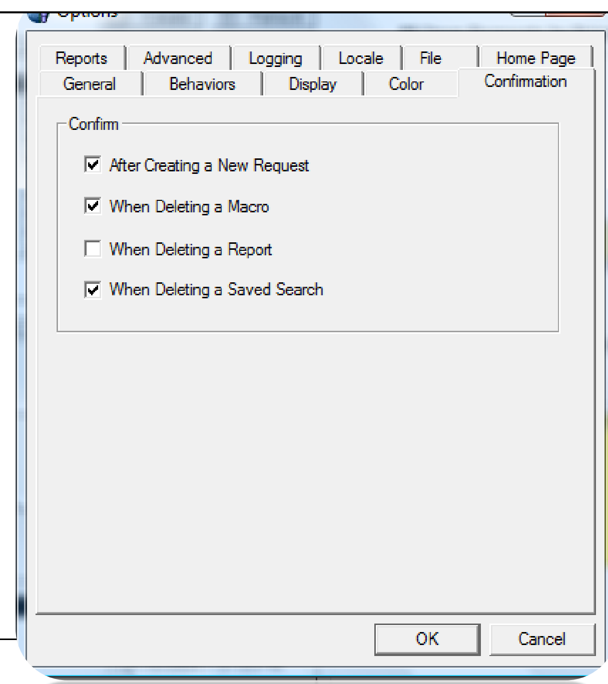
At the creation of a New ticket the Ticket will disappear. If you are using Client you can allow for the ticket number to show in a Pop-Up box at the creation of that ticket so that it may be searched upon.

Directions to setting the Confirmation:

In Client Click Tools> Click Options> Click Confirmation

Check >After Creating a New Request





OPTION 4 – RIGHT CLICK MENU

The Right Click Menu offers a quick and easy way to:

- Move from New mode to Search mode and back.
- Open a form in a New mode.
- Print the request on the screen.
- View the criteria for searches (used to view the actual qualification statement written for the search, not run the search).

To access the Right Click Menu:

1) Move the cursor to any white space (area without a field) on the form.
2) Click the right mouse button. The menu will display.
3) Select the option that you need and click the left mouse bottom. The selected option will display.

PRINTING CASE DETAILS

Help Desk Case Details

Case ID : HD0000000000216
Requester's Name : Toby Spoor
Requester's Login : TSPOOR1
Requester's Phone :
Region : CMS-CENTRAL MANAGEMENT SERVICES
Site :
Department :
Location Address :
Office :
Alternate Contact Name :
Alternate Contact Phone :
Case Type : Incident
Category : Software
Type : Desktop
Item : Email
Summary : Groupwise issue
Description : Groupwise issue
Possible Solutions : test
Assigned To Individual : Emmanuel Odele
Assigned To Group : EUC DHS
Status : Work In Progress
Work Log : 6/5/2007 2:57:52 PM TSPOOR1
test

6/5/2007 2:55:07 PM TSPOOR1
test

.ng application.

PRINT CASE

1) select the Print Case button to print a report of the details of the request.

2) When the Print Case button is selected, a Help Desk Case Details screen will appear. If you would like to print a hard-copy of this information:

3) From the menu bar, select File. A submenu will display. From the submenu, select Print (or hit Ctrl P on the keyboard). Your print options dialog form will display.

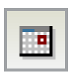
4) From the print options dialog, select the printer and hit the Print button.

FIELD LABEL CONVENTION

Field label font styles indicate which fields are to be filled in before saving the request.

Label	**Indication Description**
Bold	Indicates that the field is required.

Label	**Indication Description**
* *Italicized*	Indicates that the field is system generated (automatically filled in by the application).
+	Indicates that the field is associated with some system automation. This action will be triggered when the user places the cursor into the field and hits the Enter key.
Regular Type or **Bold** with no *	Indicates that entries in these fields are not required, but may be needed to assist in resolution or tracking.
Grayed out	Indicates that the entries in the field cannot be modified.
	Indicates the field has an associated drop down menu.

Label	Indication Description
	When used with a text field, you may click this icon and open an expand box into which you can enter additional text.
	When used with a date/time field, you may click this icon to open a calendar.
	Indicates a diary field. When information is entered into the field and saved, the information is permanent and cannot be changed or deleted. Additionally, entries will be automatically posted with the date/time of the entry and the name of the user who put the information into the field.

COMPLETING THE GENERAL TAB

The General tab contains details about the user that has requested the service. The majority of information displayed in this tab populates automatically from the entry of the requester's name in the Name*+ field. Automatically populated information must be verified to ensure that the ticket is routed to the correct group/location for resolution. If the automatically populated information is incorrect because the requester is visiting another location, or has temporarily changed locations, corrections should be made at the request level only. If the requester has permanently changed locations, an update of the requesters profile is required. Changing the requesters profile will be addressed later in this guide.

When the Request form is displayed in New mode, the following information is needed:

Requester Information

Note: The Profile must be set up for any Login*+ and Name*+, and Region+, to be used.

- Name*+ - Required – Enter the Requester's whole last name, or the first few letters of the last name and hit the Enter key. If the entered person has a Remedy Profile, information about them will automatically be added into the fields on the Requester Information tab. If more than one match is found, the system will display a list from which the user can choose the correct name.
- Login*+ - Required – This field may be automatically completed from information obtained from the Requester's profile when the Name*+ field becomes populated.
- VIP – System Generated – Will be automatically populated when the Requester's name information is obtained. This field is read only and cannot be changed. Identification of a staff member as a VIP is controlled by the individual Agencies.

- Phone – *This is a **Required** field for Telecom*. Optional – Verify the automatically populated information or manually enter the phone number, including extension. The appropriate format is as follows: ###-###-#### X####.
- Region* – Required – Use this field to identify the Agency to which the Requester belongs. This field may be automatically completed from information obtained from the Requester's profile when the Name*+ field becomes populated. If the field does not automatically populate, or if the automatically populated information is incorrect, use the field's associated menu to locate and select the correct information. Do not manually enter text into this field. Although this field is optional, it is strongly suggested that every effort be made to ensure an entry is made here. The Region field is used for reporting and similar purposes, and is needed to make sure that ticket routing is handled correctly by Remedy.
- Site – Optional – Use this field to identify the Bureau, District, Region and Zone to which the Requester belongs. This field may be automatically completed from information in the Requester's profile. If the field does not automatically populate, the corresponding information must be selected from the field's associated menu. Do not manually enter text into this field.
- Department – Optional **–(Not used for Telecom)** Use this field to identify the department to which the Requester belongs. This field may be automatically completed from information in the Requester's profile. If the field does not automatically populate, the corresponding information must be selected from the field's associated menu. Do not manually enter text into this field.
- Location –**(Not used for Telecom)** Concatenation of fields pulled from the requester's profile (Street, City, State, Postal Code).
- Office – Optional – **(Not used for Telecom)** This field identifies the office number to which the Requester is assigned. This field may be automatically completed from information in the Requester's profile. If the field does not automatically populate, you may enter the office information manually.

- Street, City, State, Postal Code – Required for most business needs– This field identifies the physical work location of the Requester (Login+) of the service. Information will be auto-populated when the Login+ field is completed.

- Source* – Required - How was the request placed with CMS-BCCS: Phone (Phone is the default), Requester, Email, Web, NMP

- Urgency – Optional – This field determines the customers Urgency with this Request.

  Note: Business Rules for Telecom state that the Priority and Urgency fields will be the same in most situations.

- Alt Name – Optional – **(Telecom: This field should be completed with the Site Name contact)** Alternative name for contact purposes (who to contact at the agency)

- Alt Phone – Optional - **Telecom: This field should be completed with the Site Phone contact number Format Mask is ###-###-#### X####)** Alternative phone for contact purposes (where to call at the agency)

Support Information

- Group* - Required - This field defines the group that will be assigned responsibility for the Request. After the request's CTI has been entered, the field's associated menu will be filled with the names of the group or groups that have been defined as having the skills needed to be assigned to the Request.

- Profile Button – Optional – Use this button to view additional information about the Requester, to access and update the Requester's profile, or to create a profile for a new user.

  Note: This field must be set up if the Login*+ and Name*+ fields have not been populated before see Profile for more information.

- Priority* - Required – The Priority field is blank by default and must be set for the ticket to be saved. *See DEFINING THE PRIORITY OF THE INCIDENT for more information*

DEFINING THE PRIORITY OF THE INCIDENT

The impact of an Incident is the composite of many factors: the number of individuals impacted, the type of service being disrupted, the length of the outage, the number of times the problem has recurred, the availability of a work-around, and the length of time the problem has been open.

On the Help Desk form, the fields used to identify the impact of the Incident are the Priority and Severity fields. All tickets must be given a Priority code and Request Impact rating before the request can be saved. The assigned Priority may be raised or lowered as work against the Incident progresses. Changes to the originally defined impact should be manually noted in the Incidents Work Log field.

- Priority – Urgent – Emergency (Total Outage in Telecom perspective)Use this option when an Incident affects a business critical application, is time sensitive and has direct and immediate impact to the end-user, places significant burden on end-user's operations and there is no known work-around available. Examples of Urgent Incidents include, but are not limited to: high visibility, availability or processing problems, network problems, system hardware, software problems or batch processing problems. All Urgent Incidents will be worked continuously unless otherwise agreed upon until the problem has been resolved. It is the responsibility of the Manager of the respective area (Tier-1, Tier-2, Tier-3) where the Incident has been assigned to follow up, coordinate activities, and ensure appropriate resources are working on the problem. It is the responsibility of the IT Service Desk Manager to ensure ultimate resolution.

- Priority – High – Emergency - Use this option when an Incident affects business critical applications, the Incident is time sensitive and/or a reoccurring problem has indirect impact to the end-user, and an interim work-around solution is available. It is the responsibility of the Manager (Tier-1, Tier-2, Tier-3) of the respective area where the Incident has been assigned to follow up, coordinate activities, and ensure appropriate resources are working on the problem. It is the responsibility of the IT Service Desk Manager to ensure ultimate resolution.

- Priority – Medium – (Most Change Requests will fit into this category)-Use this option when an Incident affects users ability to perform normal operations, inhibits productivity but there is a work-around available, or the Incident is not time sensitive. Examples of Medium problems include: response time issues, user misinterpretation of system functionality, and low to medium visibility etc. It is the responsibility of the Manager of the respective area (Tier-1, Tier-2, and Tier-3) where the Incident has been assigned to follow up, coordinate activities, and ensure appropriate resources are working on the problem. It is the responsibility of the IT Service Desk Manager to ensure ultimate resolution.

- Priority – Low – Routine-Use this option when an Incident affects documentation, process or procedures, does not impact users ability to perform normal operations and/or there is a work around available. Resolution to this Incident can be accomplished within the next 30 days or with the next available release.

REQUEST IMPACT
(WILL BE USED AT A LATER DATE)

The Request Impact field provides a method for assigning a value to an Incident so that the impact can be communicated to the people involved in the support process. Request Impact codes can identify urgent situations, and allow for the correct prioritization of requests.

To complete the Request Impact field, click on the field's associated pull-down menu and select the Impact level that is most applicable for your request as defined in the table below.

- High - is the highest level of severity. A Request Impact High call is considered a critical call and should initially have the highest priority.

  Characteristics of a High Impact issue include:

  Business service is not operational

  Production system crashes

  Data integrity is at risk

  Production backup and recovery operations failed

A business service, major application, or system is seriously affected or implementation stopped. No acceptable workaround is available.

Sever impact to a single user

- Moderate Service Impact

  Medium calls are classified as a routine call. Characteristics of a Medium issue include:

  A business service, major application, or system is moderately impacted, no data bas been lost, and the business service, application or system is still functioning.

  The issue may be temporarily circumvented using an available workaround.

  Issues affecting a single user

- Low Service Impact

  Low calls are classified as a request or training call. Generally these are minor requests that do not significantly affect production. Low issues might include:

  A software error for which there is a customer-acceptable workaround.

  Minimal degraded performance due to software error.

  Software error or incorrect behavior with minor impact to the operation of the system.

  Enhancement requests.

- No Service Impact

  No Impact calls are classified as an informational call, a non-critical issue, or documentation issue.

  Non-critical issues. No Impact issues will only impact a single user.

The assigned Impact should be independent of the computing environment. Because of the nature of support calls it is likely that requests will often change in Priority as they are worked to a resolution; however, the initially assigned Impact will always remain the same.

Case Type*

The Case Type field defines the class of the request. In keeping within ITIL framework, the Case Type field defaults to case type of Incident.

By using the field's associated menu, the Case Type may be changed from "Incident" to one of the following options:

- Incident –A general indication of a condition that needs attention. By default, every new case is classified as an Incident**.**
- Question - use this option when a caller is seeking information or asking how to perform a specific function such as creating a table in MS Word.
- Request – this option is for the provisioning of services through the Service Desk.
- Problem – use this option when there is a condition in which multiple Incidents with similar symptoms have indicated an error for which the root cause is unknown. A problem can also be a single very significant Incident.

CREATING A USER PROFILE

A User Profile is required for all INTERNAL State of Illinois employees and contractors. If a user profile does not exist for the person requiring the Service Request, one must be created before the request can be saved.

To create a new user profile:

1) From the General tab of the displayed Service Request, select the Profile button next to the Name*+ field. The Person Information form will display.
2) Complete the following required fields:
3) Login Name* - Enter the requester's first initial and last name. Entries must be in all capital letters.
4) Status – Enter Active in this field if it has not already been populated.
5) Last Name* - Enter the requester's complete last name.
6) First Name – Enter the requester's first name (or the first name that they usually go by – i.e. William might be listed as Bill).
7) Full Name – At the present time this filed will require manual population from the First and Last name fields.
8) Support Staff? – **(Telecom: NO)** Options are: Yes or No. Select "Yes" if the requester is a member of the IT staff. Select "No" for all other users.

   Note: This is a very important field, if Yes is chosen and a Bulletin Board message is sent to Support the this user will receive an e-Email in regard to the Bulletin board item.
9) Type* - Options are: Internal or External. Select "Internal" for all State of Illinois employees or contractors. Select "External" for all other users.
10) Manager? **–(Telecom: NO)** Options are: Yes or No. Select "Yes" if the user is a manager or above. Select "No" for all other users.

11) Notification Method – Select Email from the available options. This is the only notification method used by the State of Illinois.

12) Email Address – Enter the user's email address.

Note: VERIFY this address, make absolutely sure it is correct. If it is not correct there will be no notification sent to the individual.

13) Phone Number – **(Must Format this field the mask to use is ###-###-#### X####)** Enter the user's phone number, including extension if applicable.

14) Region – **(Telecom: For all IWIN incidents, Telecom SD to select the following options from the menu: IWIN-State Agencies, Municipalities, Federal Agencies, or Colleges and Universities.)**Select the user's Agency designation from the field's associated menu. For external users, select the designation for the agency to which the caller's application belongs.

15) Site – **(Telecom: Use this field menu for IWIN incidents)**

16) Department – **(Telecom: Make a selection from this menu for all incidents that use the Region IWIN – State Agencies)**

17) Address – **(Telecom: leave blank)** In the fields displayed on the Address tab, enter the user's physical work location information (Street, City, State, etc).

18) **Save and Close**

TEMPORARY LOGIN+ AND NAME+

As Users call into the Service Desk for a one time question it will not be necessary to add a Profile. To create a temporary NAME+ and LOGIN+ entry follow the directions below:

1) Type the Name of the caller in the Login+ and the Name+ fields, avoid striking the enter key.
2) The Region field will require population (CMS would be fine)
3) These are the only fields in the "Normal" Profile that will be required.
4) When the Header fields are updated and the Save button is clicked an AR note will appear. The note will ask whether or not a People form (Profile) should be created, respond by clicking on No.
   The Name+ and Login+ are temporary but searchable.

THE MANAGEMENT CONSOLE

THE MANAGEMENT CONSOLE ACTS AS THE PRIMARY POINT OF INFORMATION FOR MANAGEMENT AND LEAD SERVICE DESK STAFF.

THE CONSOLE IS COMPRISED OF THE FOLLOWING COMPONENTS:

- Quick Links
- Filter Options
- Manage Requests Table: Clicking on any header will sort in either Ascending or Descending order.
- Bulletin Board

- Flashboards

Quick Links

- Quick Links allow users easy access to forms and features within Remedy. Quick Links are like URL's – they only need to be clicked once to activate the related activity or form.
- Create Request – Select this quick link to create a new request.
- Search Request – Select this quick link to locate and view an existing request.
- Search For Task – A task is an activity or action that must be done in order to successfully complete a Change Request. Use this quick link to locate and view existing tasks.
- Track Assets – Select this quick link to display the Manage Asset Information dialog form. From this dialog you can view existing asset or component records.
- Reports – Select this quick link to generate predefined reports on Incidents, Change Requests, Asset records, Procurement records and Provisioning records.
- Reminders – Select this quick link to create and view Reminder messages.
- Preferences – Use this quick link to select which form will open when the user selects the New Request or Search for Request quick link.
- Approvals – Select this quick link to view items that require your approval.

- Help – Use this quick link to view out-of-the-box help on using the Remedy applications.

- Manage Passwords – Use this quick link to access the Password Manager dialog form. From this form users can change their passwords.

- Console Views

  You can use the Console View drop-down menu to change the set of requests that you are viewing. By making different choices in the Console View menu, you can view:

  YOUR REQUESTS ONLY

  ALL REQUESTS

  REQUESTS FOR YOUR GROUP

  REQUESTS FOR A PARTICULAR DATE

  UNASSIGNED REQUESTS

- Flashboards

The Flashboards on the right side of the Support Console display console data graphically, so you can grasp it more easily. The upper Flashboard displays the entire set of requests that you have chosen from the Console View list. The lower Flashboard displays the console data in several different ways, depending on the tab you have clicked.

To see exactly what each Flashboard shape represents, move your pointer over the shape, and hold it there for a few seconds. A tooltip appears, revealing the data that is behind the shape.

After changing the console view, you may need to click the Refresh button. The date and time of the last refresh appears below the lower Flashboard.

Auto-fill feature in fields and lists

When a plus sign (+) is included in a field label on any form, you can enter part of the information and press ENTER. If an exact match is found in the database, the system automatically completes the field. If a selection list appears, double-click on the selection you want to enter into the field. Using the auto-fill feature in fields and lists is faster, more consistent, and more accurate than typing the information yourself.

Filtering Incidents that are Displayed in the Manage Requests Table

- The View By and Filter By field options allow managers to filter the Incidents that display on their Manage Requests table.
- From the View By field, select the type of Incident that you want to view. Options are:

  Escalated Requests, Urgent Requests, High Requests, SLA Escalations, Requests Assigned To, All Open Requests, Solutions to Approve, Reassignment Requests, Responded Surveys, My Pending Approvals, All Pending Approvals, VIP Requests, Procurement Requests, Provisioning Requests. The table will refresh with the information on the type of incident that you selected.

TO FILTER THE RETURNED RESULTS:

10) In the Group field, use the field's associated menu to select the name of the group whose incidents you would like to review. Example: CMS Application Support. The list will refresh with just the records that meet the defined criteria.
11) To open a request from the table, highlight the Incident and click the View button or double-click on the Incidents information in the table. The Incident will display in modify mode.

REMEDY IT SERVICE MANAGEMENT CONSOLE

THE IT SERVICE MANAGEMENT CONSOLE ACTS AS THE PRIMARY POINT OF ENTRY FOR ACCESSING REMEDY FORMS.

The console is comprised of the following components:

- Quick Links: Click on the requested item one time and you will hyperlink to that item.

THE QUICK LINKS ARE COMPRISED OF THE FOLLOWING ITEMS:

- Create Request: Selection choices are, Help Desk Case or Change Request
- Search Request: Selection choices are, Help Desk Case or Change Request
- Search Tasks: When this is clicked the Task Information form will appear. A task is an activity or action that must be done in order to successfully complete a Change Request. Use this quick link to locate and view existing tasks.
- Manage Assets: When this is clicked the Asset Management Console will display complete with Asset Quick Links. Select this quick link to display the Manage Asset Information dialog form.

- “To be introduced later part of 2007” Manage SLAs: A service level agreement is a contract that defines the quality of service that a customer can expect from a support provider. The Remedy Service Level Agreements (SLA) application enables IT managers to guarantee a high level of responsiveness and to measure the relationship between the support staff and their customers.

- When clicked the Service Level Agreement Console will display complete with links to SLA Monitoring, SLA Reporting, Update Performance, and Administrator Console.

OTHER

- Reports: When clicked the Report Form will display. Select this quick link to generate predefined reports on Incidents, Change Requests, Asset records, Procurement records and Provisioning records.

- Reminders: When clicked the Reminders window will display and choices are available to Show or Create Reminders.

- Preferences: When clicked, the Preferences dialog box will display, choices may be made to update the logged-in users profile and change certain display settings.

- Approval Console: When clicked the Approval Console will display complete with Approval Quick Links. Select this quick link to view items that require your approval.

- Managed/Assigned Requests Table: This table will show any Remedy Requests that have been directly assigned to the logged-in user or the group that the logged-in user has been assigned to. To open a request from the table, highlight the Incident and click the View button or double-click on the Incidents information in the table. The Incident will display in modify mode.

- Various Filters: The Group filter will allow the logged-in user to filter information for viewing only certain Groups to which requests have been assigned. The Region filter will allow the logged-in user to filter information for viewing only certain Regions. The Show filter will filter various types of Request choices. The Console View will filter using various items such as Date and Other Agent.

- Console Views

  You can use the Console View drop-down menu to change the set of requests that you are viewing. By making different choices in the Console View menu, you can view:

  YOUR REQUESTS ONLY

  ALL REQUESTS

  REQUESTS FOR YOUR GROUP

  REQUESTS FOR A PARTICULAR DATE

  UNASSIGNED REQUESTS

  ANOTHER AGENT'S REQUESTS

- Bulletin Board: The Bulletin Board will display any global support information that the entire Enterprise could be interested in. Bulletin Board items may be created from here.

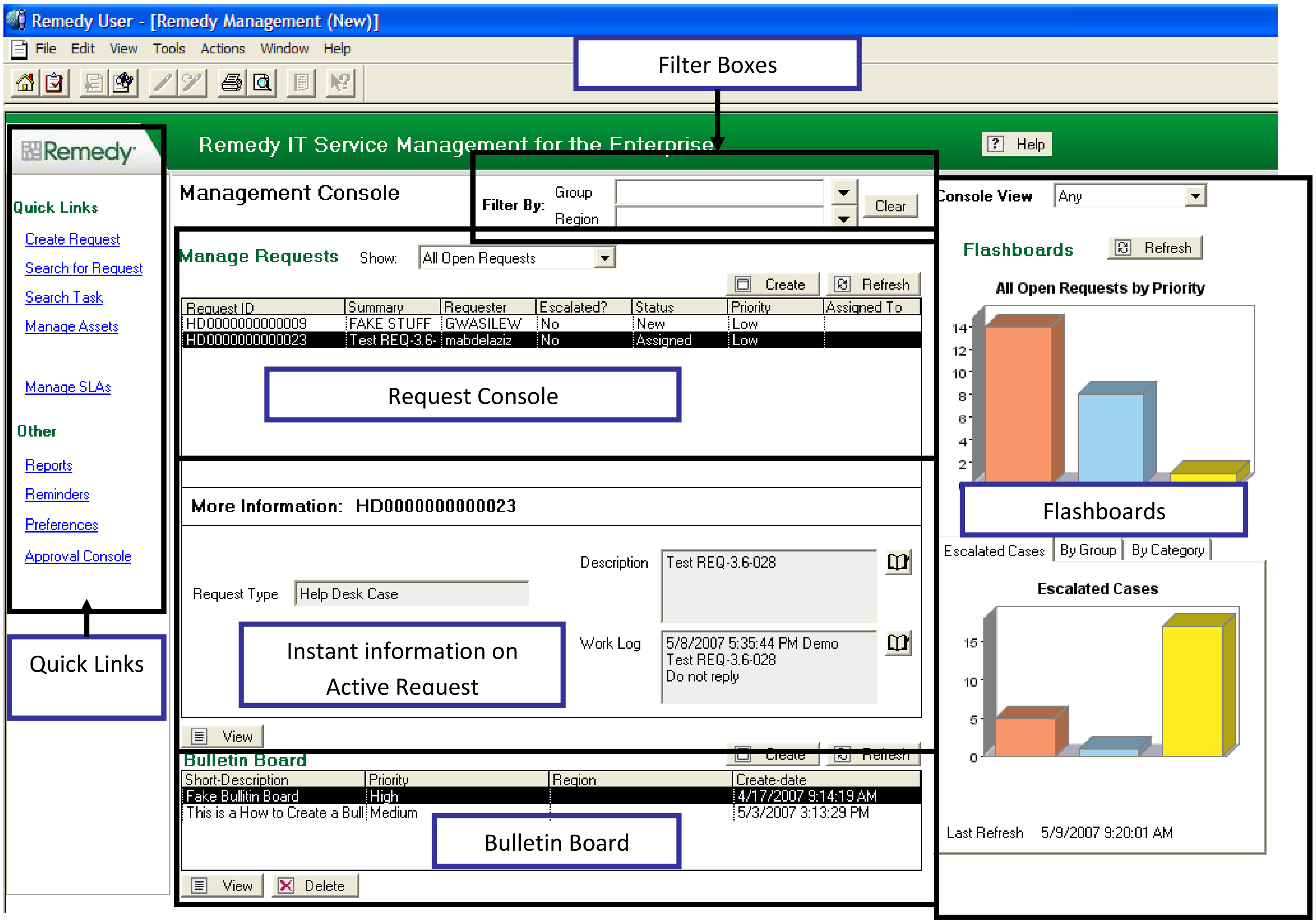
- Flashboards: Flashboards will display information in a graphed format. This is great for viewing Escalated Cases.

- Flashboards

  The Flashboards on the right side of the Management Console display console data graphically, so you can grasp it more easily. The upper Flashboard displays the entire set of requests that you have chosen from the Console View list. The lower Flashboard displays the console data in several different ways, depending on the tab you have clicked.

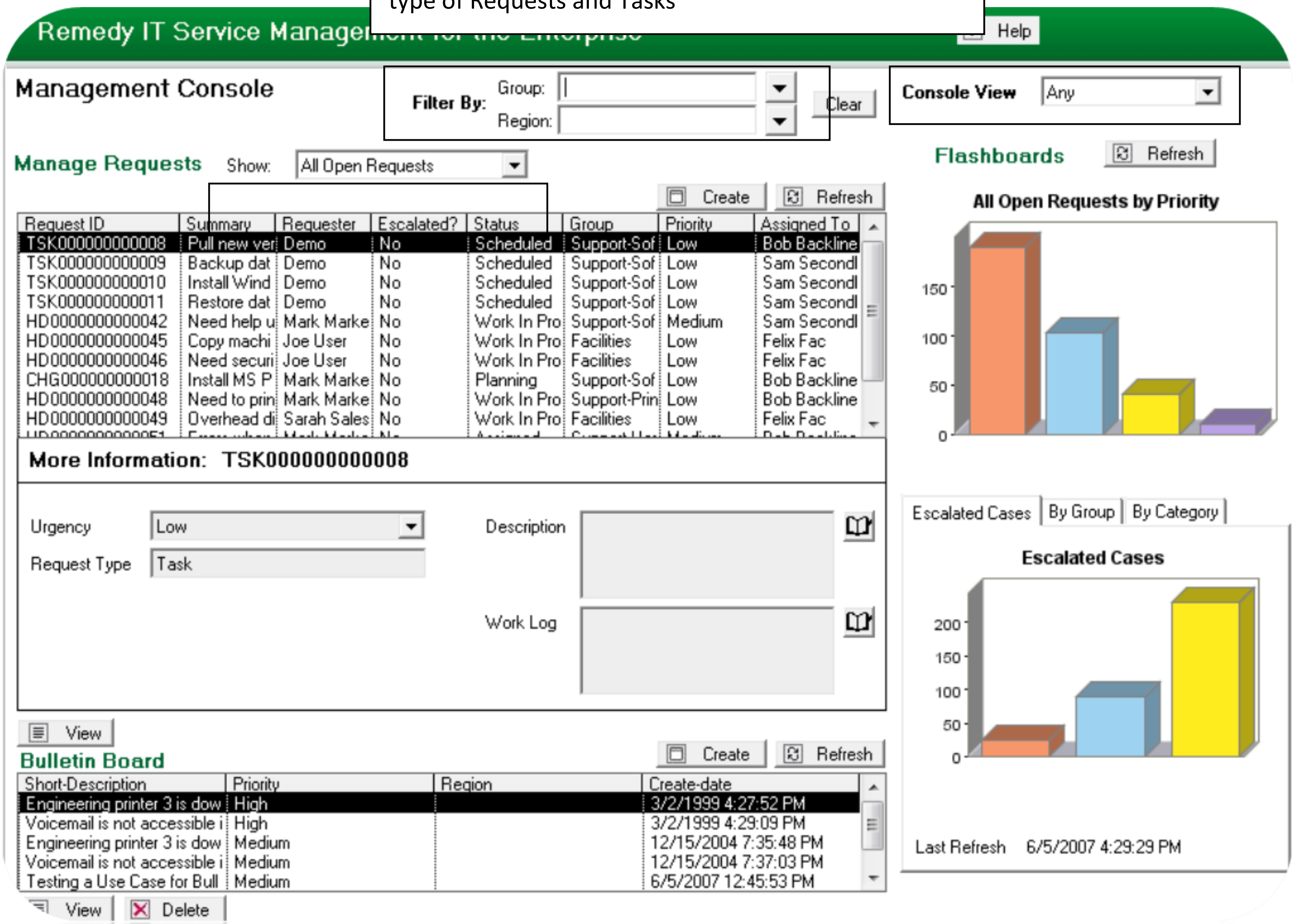
To see exactly what each Flashboard shape represents, move your pointer over the shape, and hold it there for a few seconds. A tooltip appears, revealing the data that is behind the shape.

- After changing the console view, you may need to click the Refresh button. The date and time of the last refresh appears below the lower Flashboard.
- Help: Use this quick link to view out-of-the-box help on using the Remedy applications.


Remedy User - [Remedy Management (New)]
File Edit View Tools Actions Window Help
Filter Boxes
Remedy IT Service Management for the Enterprise
Help
Quick Links
Create Request
Search for Request
Search Task
Manage Assets
Manage SLAs
Other
Reports
Reminders
Preferences
Approval Console
Management Console
Filter By: Group Region
Clear
Console View Any
Manage Requests Show: All Open Requests
Create Refresh
Request ID Summary Requester Escalated? Status Priority Assigned To
HD0000000000009 FAKE STUFF GWASILEW No New Low
HD0000000000023 Test REQ-3.6- mabdelaziz No Assigned Low
Request Console
Flashboards Refresh
All Open Requests by Priority
Flashboards
More Information: HD0000000000023
Description Test REQ-3.6-028
Request Type Help Desk Case
Work Log 5/8/2007 5:35:44 PM Demo Test REQ-3.6-028 Do not reply
Instant information on Active Request
View
Escalated Cases By Group By Category
Escalated Cases
Bulletin Board
Short-Description Priority Region Create-date
Fake Bullitin Board High 4/17/2007 9:14:19 AM
This is a How to Create a Bull Medium 5/3/2007 3:13:29 PM
Bulletin Board
View Delete
Last Refresh 5/9/2007 9:20:01 AM
Quick Links

MANAGEMENT FILTER

Management Console should be filtered to include all type of Requests and Tasks



CREATE NEW INCIDENT

BUSINESS RULES ASSOCIATED WITH CREATING A NEW INCIDENT

Description: An Agency / Customer identifies a need for requesting assistance and takes necessary steps to seek internal approval(s) to initiate a request with CMS through their authorized methods.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
1a.	Authorize the need to open a new Request.	N/A	Requested For	• Contacts their identified / authorized agency Requested By regarding opening a request. • Provides detailed information on the purpose and specific need for request. • Provides up to date contact and affected asset tag(s)	• Requested For is responsible to solicit their designated agency Requested By only for all requests for service. • Requested For is responsible to consult with designated Task Coordinator or Requested By to check on the status of an opened request.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				information. • Identifies time frame or expectation to complete request (Urgency and Requested Date fields).	• Requested For or a designee is responsible to be available at the date and time that the Support Technician would be onsite to complete the work (when applicable).

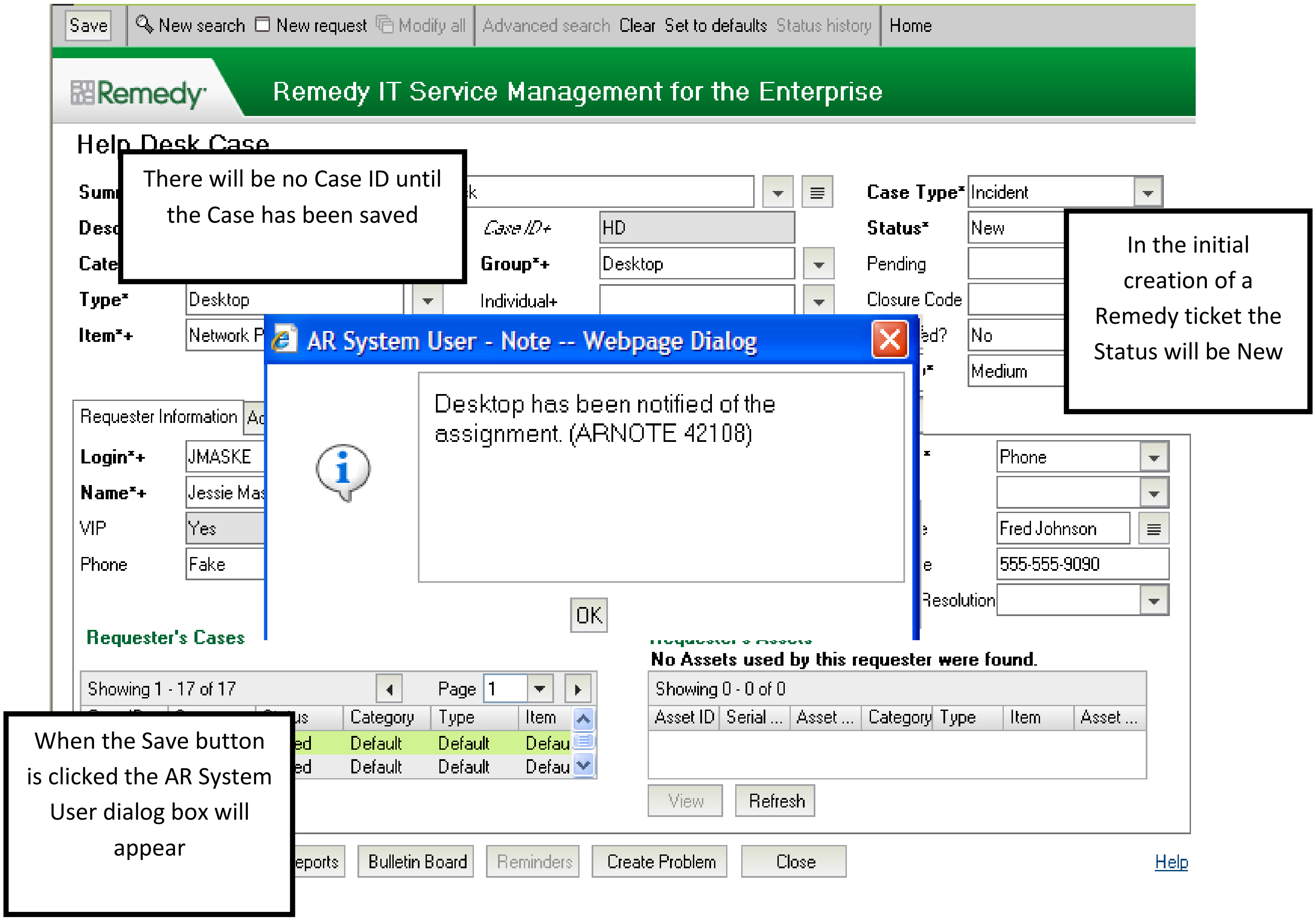
Business Rule # 2 (a, b, c) The following Business Rules should be invoked every time a new Service Request is opened.

RULE #	OBJECTIVE(S)	REQUEST STATUS	RESPONSIBLE AREA	ACTIVITIES	BUSINESS RULES
2a	Customer has a need for IT/Telecom Assistance	N/A	Service Desk	• Consults with the Requested For to confirm Urgency and to review that all request details, contact and Asset information are correct	• Requested By is responsible for consulting with the Requested For to confirm the specific needs and Urgency, as well as review and verify contact information and asset / inventory tag(s) related to the request are correct / up to date • Requested By is responsible for keeping the Requester informed on the status of the request as needed; and to follow up with the Service Desk to request a status check on the request

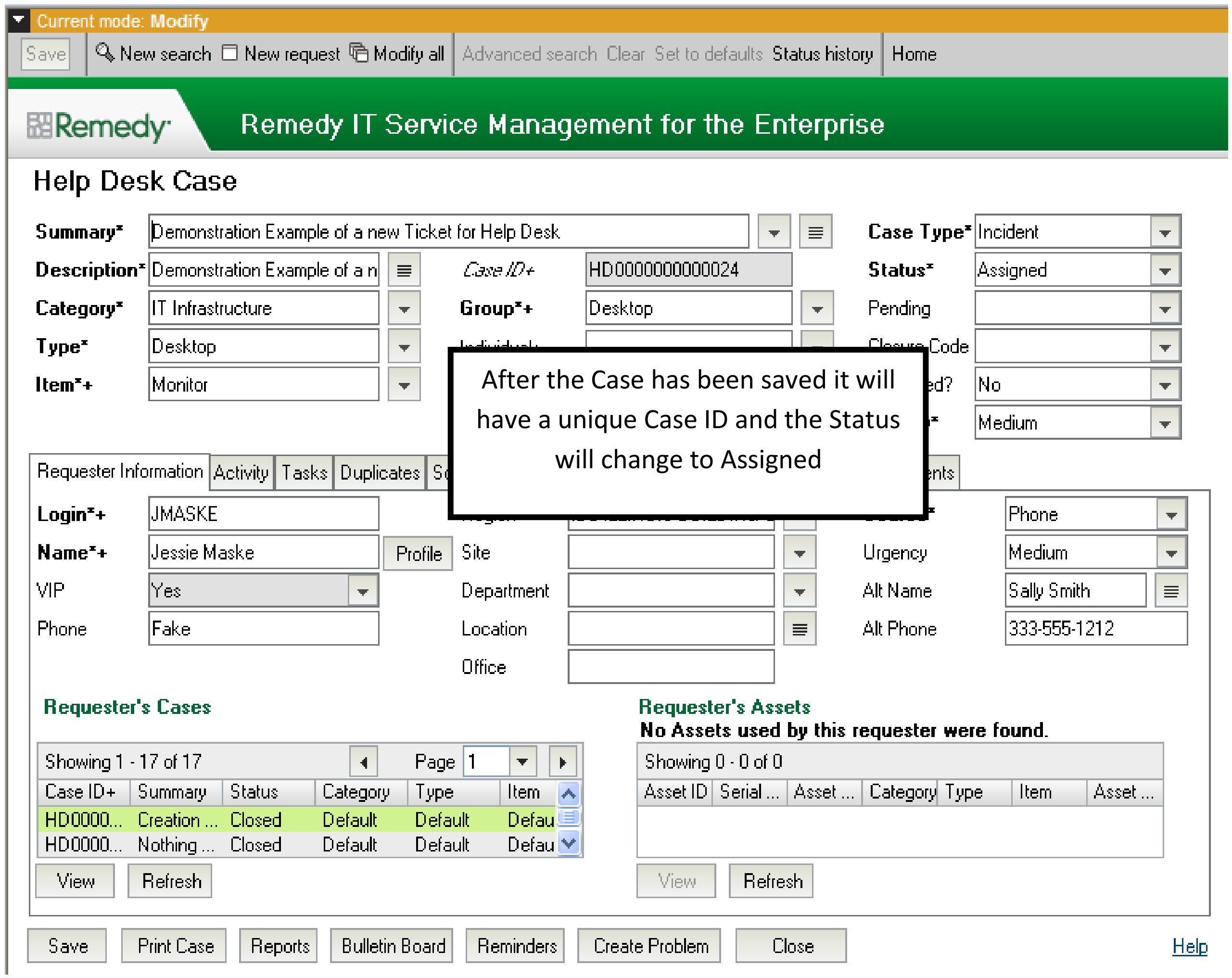
2b	Service Desk opens a new service request	N/A	Service Desk	• Requested by: Consults with Service Desk to provide additional details related to the request (when applicable) • Retains electronic or hardcopy records of request to meet agency specific policy / audit requirements	• Requested By is responsible for Phoning or Emailing the Service Desk with all required / detailed / accurate information in a timely manner • Requested By is responsible to follow up in providing any additional information or details of the request when consulted by the Service Desk (as needed)
2c	Receive new service request and reviews for accuracy / completeness	N/A	Service Desk	• Monitors the Service Desk Email queue for new service requests • Reviews new Requests to ensure completeness and accuracy of information provided	• Service Desk is responsible for monitoring incoming Email for new requests in a timely manner • Service Desk is responsible for the initial review and verification of details within the Request to ensure

				• Consults with Requested By (when applicable)	completeness and accuracy of information • Double Check the Profile information to verify the correctness of the profile. • Service Desk is responsible to ensure proper Approval name is documented and confirmed . Service Desk is responsible to follow up with the Requested By to request additional data / information related to the accuracy or details necessary to create a new service request (when applicable)

CREATE NEW HELP DESK CASE



HELP DESK CASE AFTER INITIAL SAVE



THE PREFIX OF THE REQUEST ID NUMBER INDICATES WHETHER A HELP DESK CASE OR A CHANGE REQUEST WAS CREATED:

- **HD** indicates a help desk case.
- **CHG** indicates a Change Request.
- **TSK** indicates a task associated with a help desk case or a Change Request.

Once you have noted the request ID number, click OK to dismiss the message.

If you are requesting assistance with an issue, you can try to resolve the case on your own by looking for possible solutions in the solutions database.

TO SEARCH FOR POSSIBLE SOLUTIONS FOR A HELP DESK CASE

1) From the Requester Console, click the New Request Quick Link, or click the Create button.
2) In the Urgency field, select a value.
3) In the Summary field, select a predefined summary from the menu by clicking the down arrow to the right of the field, or enter your own summary.
4) If one or more solutions are available based on what you enter in the Summary field, they will be listed in the Possible Solutions table at the bottom of the form. (If no solutions appear in the Possible Solutions table, skip to step 9.)
5) Select a solution, and click View.
6) The Solution form appears, showing the details of the solution.

7) Review the solution.

8) If the solution appears to meet your needs, you can use it to resolve the case without the assistance of the support staff, as outlined in step (7). You can also view other solutions if there are any more available in the Possible Solutions table.

9) Click Close to return to the Possible Solutions table in the New Request form.

IF YOU DECIDE TO USE A SOLUTION:

1) Select the solution from the list, and click Use Solution.

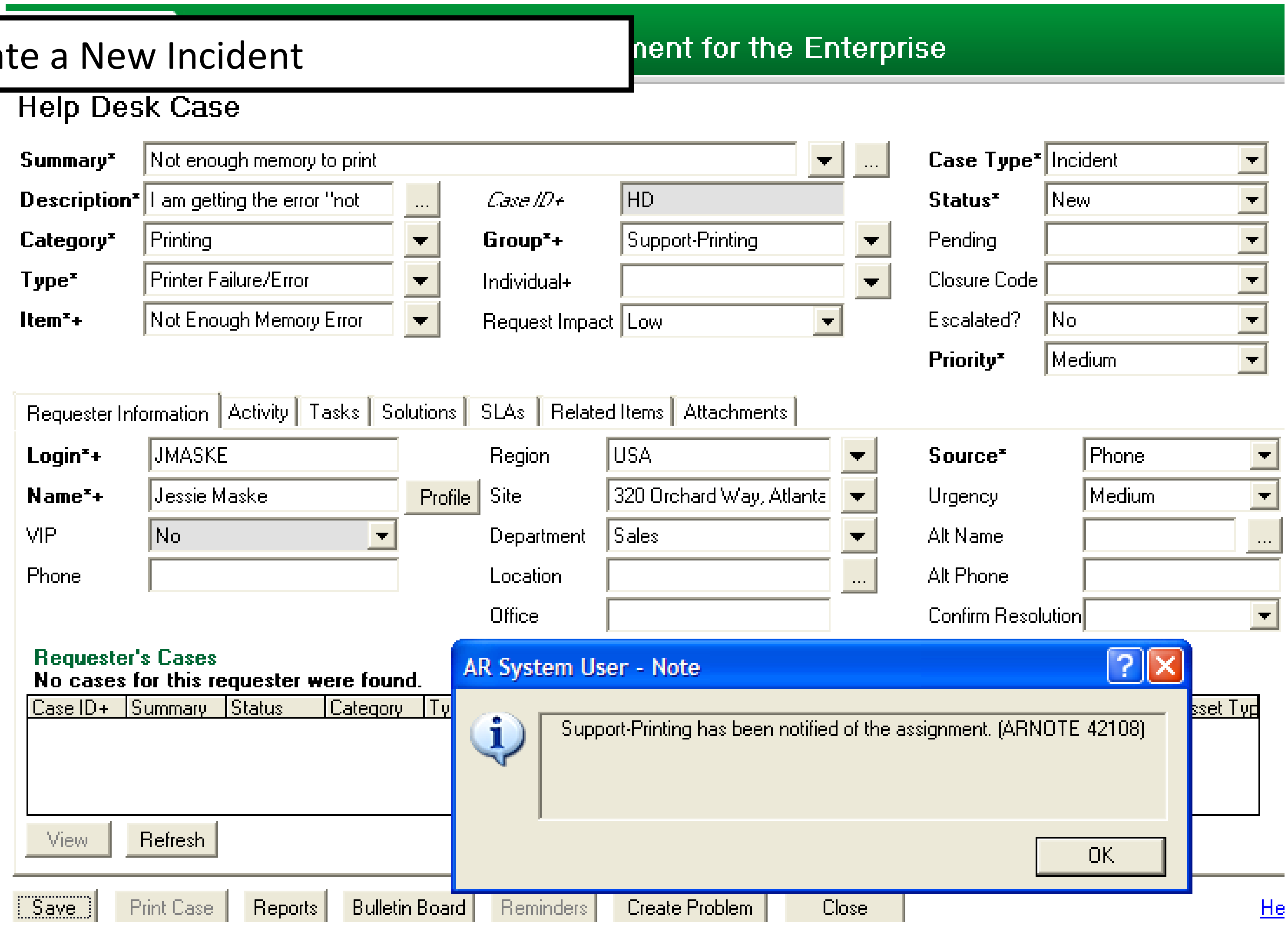
   A message reports that the request will be given the status of “Resolved” when the request is saved.

2) Click OK.

3) Save the request.

4) A message reports that the case has been submitted.

Create a New Incident



CREATE A NEW INCIDENT

SERVICE DESK/TELECOM HELP DESK

Use Case Name:	Create a New Incident
Description:	The creation of a new Incident based upon some form of communication from an end user. The new incident will be assigned to the group with the correct skills. There are no troubleshooting steps conducted by the user creating the incident.
Actors:	Incident Support Incident Manager
Status:	Current

BUSINESS RULES FOR CREATING A NEW IT SERVICE DESK REQUEST

Create a New service request (Status=New)

Description: Service desk creates new service request in the Remedy system based on data provided by the customer. Service request is then assigned to the appropriate Shared Service support team.

STEP	OBJECTIVE(S)	REQUEST STATUS	RESPONSIBLE AREA	ACTIVITIES	BUSINESS RULES
3a	Create a new Service request in the Remedy system	NEW	Service Desk	• Creates new service request for customer based on information and detail provided by the customer. • Ensures all Required fields are filled in the Remedy service request detail • Updates and checks the Profile and checks the CTI for the correct placement into a Group,	• Service Desk is responsible for selecting the appropriate Remedy profile name / ID for the Requested By and ensures the "Requested For" section contains the Requester For name / ID • Service Desk is responsible for reviewing the Region, Site, Department data is validated against the Name / Address / Location of the Requested For is accurate; or will ensure proper updates to Region, Site

				and saves the service request as NEW status	or Department is made (when applicable) • Service Desk is responsible for selecting the appropriate Remedy profile name / ID for the Requested By and ensures the “Requested By” section contains the Requested By name / ID • Service Desk is responsible for selecting the appropriate Remedy profile name / ID for the Task Coordinator and ensures the “Task Coordinator” section contains the Task Coordinators name / ID • Service Desk is responsible for ensuring all Required fields are filled in accurately in order to

					Save the request in a NEW status
3b	Assign the service request to the appropriate Shared Service team for support	ASSIGNED	Service Desk	• Selects appropriate Category, Type, Item (CTI) and Region, Site, Department (RSD) based on customer location and the request type • Ensures the Assignment Group is correctly selected based on CTI and RSD • Attaches any pertinent supplemental documents related to the service request • Updates the work-log with a new entry and	• Service Desk is responsible for either selecting an appropriate "Summary" field drop-down related to the service request type (when applicable) which will automatically fill in the correct CTI data; otherwise a new Summary field is to be typed in and then manually identify the correct CTI selections related to the service request type • Service Desk is responsible for ensuring the correct RSD is filled in related to the Requesters location where the work is to be done at

				saves the service request into Assigned status • Note – It is extremely important for Service Desk to understand that if a customer requests a certain Technician that they not argue with the customer, but that they will assign only to a Group and not an Individual. It is the Group that will place the Request to the appropriate Individual.	• Service Desk is responsible for ensuring the correct Shared Service team is selected within the "Assignment Group" field of the service request to ensure proper routing of the request • Service Desk is responsible for saving the request to ensure the request will be routed directly to the Shared Service team for assignment
3c	Receive a new service request in the Shared Service team Assignment queue	ASSIGNED	Shared Service team	• Monitors all appropriate assignment queues for incoming / new service	• Shared Service manager (or appointed delegate) is responsible for actively

				requests and reviews highest priority requests first and foremost • Reviews new service request details to ensure the request has been properly routed to correct assignment group • Routes improperly assigned tickets to their support team to the appropriate Assignment Group, or may consult with the Service Desk for assistance	monitoring their designated Assignment queues for New service requests routed to them (supported during normal M-F business hours); and to expedite highest priority requests in the queue first and foremost • Shared Service manager (or appointed delegate) is responsible to review the service request details in a timely manner to ensure the request is in the proper assignment group queue; otherwise identify the correct Assignment Group or consult with the Service Desk for assistance

					• Shared Service manager is responsible to follow up with Service Desk to request clarification or additional details related to the service request (as needed)

FREQUENCY

- This use case is to be invoked every time a new Incident, question or request needs to be manually created.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.

POST CONDITIONS

- The incident information is submitted into the Remedy Help Desk application and an incident record is created.

ASSUMPTIONS

- The user has their Setup Personal Preference profile for 'Create Request Action' and 'Search for Request Action' set to "Open Selection Dialog". This will allow the requester to make a selection from the Select Request Type menu.

FORM NOTES

Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source, and Group.

BASIC COURSE OF ACTION

1) From the Remedy Support Console, click on the Create Request link. This will open a Select Request window where the end user will select the type of request they wish to create.
2) Click the Help Desk Case link.
3) Make a selection from the Summary* menu (Proceed to Step 8) OR enter information into the field manually (Proceed to Step 4).
4) Enter a description of the Incident (This is where all the information from the Customer is added to detail what is happening in the Incident, an example of providing a good description would be providing the customers hours of operation, model number of item with problem, color if applicable , and special instructions for contacting person, just to name a few) in the Description* field.(The information to be listed in the Work Log field should detail what took place in the Incident and how it was resolved, Work-Log is a diary field and may not be edited)
5) Make a selection from the Category* menu.
6) Make a selection from the Type* menu.
7) Make a selection from the Item* menu.
8) Make a selection from the Group*+ menu. (Service Desk does not assign to an Individual, but to a group) Note: When The CTI is chosen it sets the Group automatically, if the Group is incorrect the CTI will require changing. Note: It is the Supervisor or manager that assigns individuals.)
9) (Optional) Make a selection from the Request Impact menu.
10) Select “Incident” from the Case Type* menu.(Incident is the default)
11) Make a selection from the Priority* menu. (*See Priority for further clarification*)
12) Fill in the Requester tab.
13) Enter a partial or full network login id in the Login*+ field and click Enter. If only one match is found, the Requester-related fields will be automatically populated with the Requester information. If more than one match is found, a list will appear for the user to select from.

14) (Optional) With the Login*+ field blank, press Enter. A Search People window will open with searchable fields (Search Criteria) to help the user search for the Requester's data. Enter the appropriate search criteria and click the Search button. The Search Results table below will return matching records. Select a record and click the OK button. The Search People window will close and the Requester-related fields will be automatically populated with the Requester's information.

15) Verify the Name*+ field is populated. If the field is not populated, enter a partial or full Requester name in the Name*+ field and click Enter. If only one match is found, the Requester-related fields will be automatically populated with the Requester information. If more than one match is found, a list will appear for the user to select from.

    To search with a wild card type in the name field %smith to find any name that ends in smith or John% to find all names that begin with John, then hit the Enter key

16) Make a selection from the Source* menu.(Default is set to Phone)

17) (Optional) Make a selection from the Urgency menu.(Urgency is from the Customers perspective)

    Note: Verify the Requested for/By Information for Accuracy This is a Business Rule that must be acknowledged every time a ticket is created. Update the Work Log

18) Click the Save button.

19) An AR System User Note message displays stating that the assigned support group has been notified of the Incident.

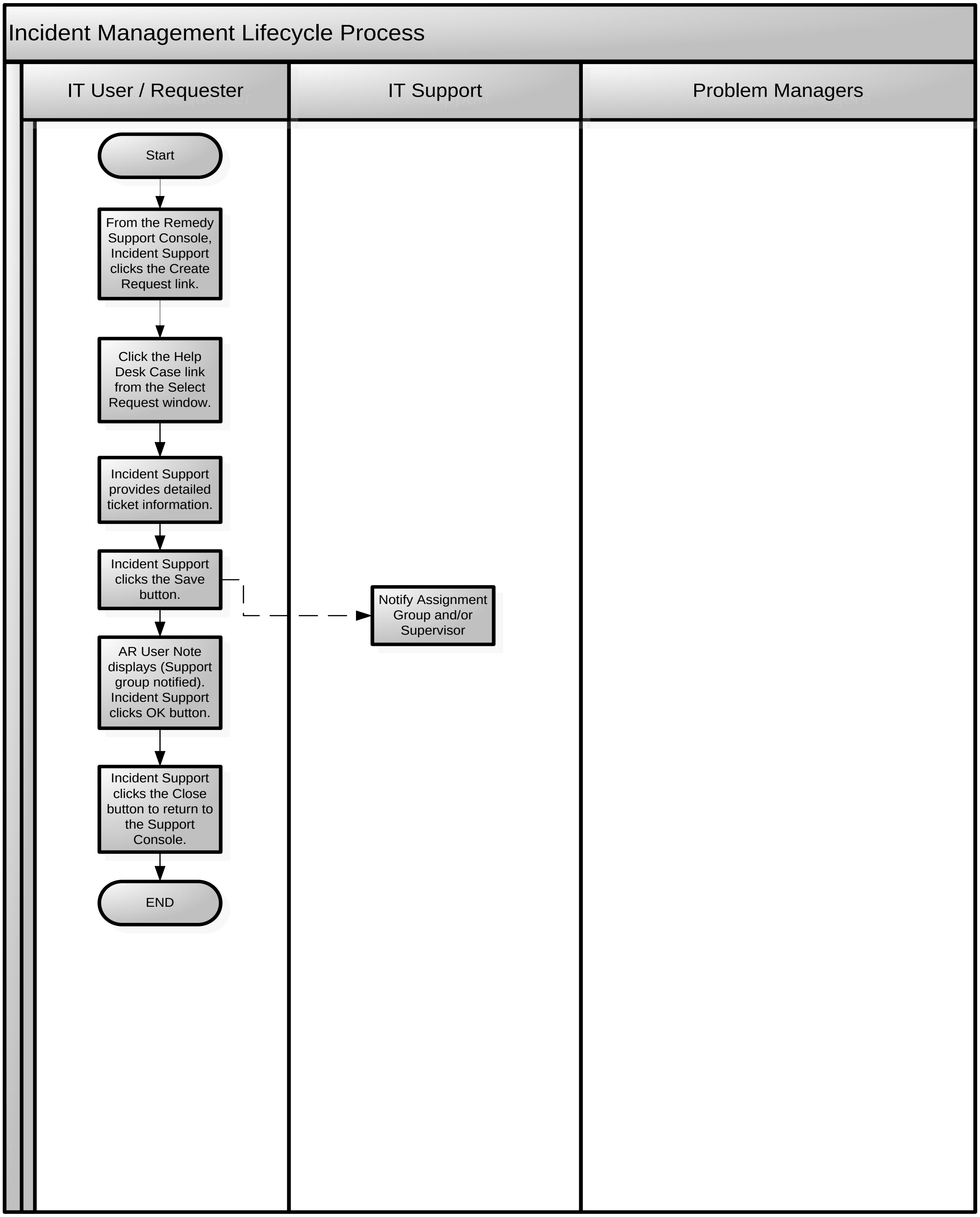
20) Click the OK button.

    Note: If you have set your Client Options to Tools, Options, Conformation, Allow for Confirm, After Creating a New Request, Then you will receive a Pop-Up that will display the ticket number, write it down so it may be searched upon quickly.

21) Notification is sent to the assigned support group.

    To return to the Remedy Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



INCIDENTS AND PROBLEMS

To understand and work with problem management successfully, you must understand the distinctions between incidents and problems, and understand the problem management process.

- Incidents are faults or disruptions in the use or implementation of IT services and are usually reported by users. For example, a user suddenly cannot access the network and calls the help desk.
- Disruptions can also occur without the user being aware of them. For example, although deficiencies in data processing or faults in data communication facilities might not be noticeable to users, they indicate faults in the organization's IT infrastructure.
- Problems are more serious issues that interfere with the effective functioning of the organization. A problem frequently becomes obvious when a number of related incidents are suspected of having a single underlying cause. Problem control focuses on establishing the cause of the problem and eliminating it, thereby resolving the problem and preventing additional incidents. Incidents that cannot be solved by the Help Desk support staff might need to be associated with a help desk case that is designated as a problem.
- Known Errors are problems that have had their root causes identified. After the root cause of a problem is identified and verified, it can be reclassified as a Known Error by selecting Yes in the Known Error field on the Problem Management tab.
- Errors can become known while analyzing problems, as well as from the information about known errors provided by suppliers. For example, software is frequently shipped with release notes that detail the known bugs in the application.

THE FOLLOWING PROCESS ILLUSTRATES THE GENERAL LIFECYCLE OF PROBLEM MANAGEMENT

- One or more help desk cases are created. By default, they are given a case type of Incident. The underlying problem of the incidents is defined, and its root cause is identified and entered into the Root Cause field on the Solutions tab. If a specific case most clearly identifies the underlying problem, a new request with a case type of Problem is created from it. Other cases can now be related to this problem as it is being resolved.

- In the Problem Management tab of the request with the Problem case type, the problem manager (or any other member of the problem management group) marks the problem as Root Cause Identified by selecting RC Identified from the Known Error Status menu.

- Other staff members verify the root cause. The problem manager (or any other member of the Problem Management group) marks the problem as Root Cause Verified (RCV) by selecting RC Verified from the Known Error Status menu.

- Once the cause of the problem is verified, the problem is reclassified as a Known Error by specifying Yes in the Known Error field. You must be a member of the Problem Management group to update this field.

- A Known Error can be resolved through a Change Request. In the Problem Management tab, a Request for Change (RFC) is created by selecting RFC Created in the Known Error Status field. You must be a member of the Problem Management group to update this field.

- The Change Request is implemented. In the Problem Management tab, the Known Error field is set to No, and the Known Error Status is changed to RFC Completed. If the Change Request is denied, the problem is marked Request for Change Denied (RCD) by selecting RFC Denied in the Known Error Status field.

- When a case marked as a problem is resolved, all users assigned to any cases with related incidents are notified.

Note: The Problem Management tab does not display when a case has been marked as a duplicate of another case.

WORKING WITH INCIDENT AND PROBLEM CASE TYPES

- When a new help desk case is created, it is designated as an incident by default. If a case cannot be resolved, or appears to have underlying causes that need to be investigated, you can create a new case designated as a problem.
- As you work through the case to identify possible causes of the stated problem, you might find other cases that have some similarities to the case you are working on. You can relate these incident cases to this problem case.
- The following procedures provide instructions for creating a problem case, relating incidents to a problem, and unrelating incidents, (so that a particular incident is no longer considered to be part of a problem).

Important: It is no longer possible to change a help desk request with a case type of Incident to a case type of Problem. You must instead create a new request with a case type of Problem,, then relate any incidents to it using the Related Items tab.

ABOUT THE TABLES IN THE PROBLEM MANAGEMENT TAB

The Potential Incidents and the Current Incidents tables in the Problem Management tab can appear at different times, depending on the situation.

Also, when they do appear, they can provide different data, depending on the circumstances:

- If you are currently viewing a help desk request with a case type of Problem, then only the Potential Incidents table appears as the upper table.
- If you are currently viewing a help desk request with a case type of Incident, then the Potential Problems table appears as the upper table.
- If you are viewing a case that is not designated as a problem, then you only see Parent records under the Duplicates tab.
- If you close a parent record, any child record is closed also.

CREATING A CASE WITH A CASE TYPE OF PROBLEM

You can create a new help desk request with a case type of Problem from an existing incident, then relate the incident to the new Problem help desk case.

To create a problem case from an existing incident

1) Open the help desk incident case from which you want to create a problem.
2) The incident appears.
3) Click Create Problem.

4) A new case, with a case type of Problem, is created.

   Note: You cannot edit the case type for a help desk case designated as a problem.

5) Click the Solutions tab, and enter information into the Summary and Details fields, as well as the Root Cause and Resolution Method fields, if known.

6) Click the Problem Management tab.

   Listed in the Potential Incidents table are requests that might be related to this Problem request. These requests have a case type of incident, and the same values in the Category, Type, and Item fields.

7) If you wish, change the Category, Type, and Item fields, then click Refresh, to view other potential incidents.

   You can perform a wildcard search by leaving any one or two of the Category, Type, and Item fields blank, then clicking Refresh.

Note: Do wildcard searches with care. Avoid searches that are so general that they retrieve a large number of matches.

Enter information into the Known Error and Known Error Status fields, either now or when you discover this information.

RELATE THIS NEW PROBLEM CASE TO ASSOCIATED INCIDENTS.

RELATING INCIDENTS TO A PROBLEM

When you are investigating a case designated as a problem, you might want to look for other cases that are similar, and designate them as related incidents.

For example, several cases might have been filed by users who cannot access the network remotely. Each case might be slightly different, but they all relate to the same issue: remote access. By designating one case as a problem, and relating the other cases to it, you have convenient access to all of the related cases from the Problem Management tab. You can view each related case to get information that will help you identify the root cause of the problem and reduce its occurrence in the future.

TO RELATE INCIDENTS TO A PROBLEM

1) Display the help desk problem case to which you want to relate incidents.
2) Click the Problem Management tab.
3) Listed in the Potential Incidents table are requests that might be related to this Problem request. These requests have a case type of incident, and the same values in the Category, Type, and Item fields.
4) If you wish, change the Category, Type, and Item fields, then click Refresh, to view other potential incidents.
5) You can perform a wildcard search by leaving any one or two of the Category, Type, and Item fields blank, then clicking Refresh.
6) View potential incidents to determine if they should be related to this problem case.
7) From the Potential Incidents table, select an incident you want to relate to this problem case, and click Mark As Incident.
8) The incident is related to this problem case and displays in the Current Incident(s) table. The Incident Count field automatically updates to reflect the total number of related incidents.
9) If you want to view potential incidents with Category, Type, or Item values other than the ones displayed, change the Category, Type, or Item fields to display the values you want. Then click Refresh.
10) If there are any incidents within Category, Type, or Item values you have selected, they display in the Potential Incidents table. Repeat step (4) and step (5) as necessary.
11) Click Save.

Note: A note displays at the top of each incident related to a problem.

UN-RELATING INCIDENTS

If a related incident appears not to be relevant to a problem, you can un-relate it.

TO UN-RELATE AN INCIDENT TO A PROBLEM

1) Display the help desk case that has the incident you want to un-relate.
2) Click the Problem Management tab.
3) In the Current Incidents table, select the incident you want to un-relate, and click Remove Case.
4) The case is removed from the list and redisplayed in the Potential Incidents table. The Incident Count field automatically updates to reflect the total number of related incidents.

RESOLVING OR CLOSING A CASE WITH RELATED INCIDENTS

- When a case marked as a problem is resolved, its related incidents are automatically resolved. Users who are assigned to the related incidents are notified of this.

- To close a case marked as a problem, you must be a member of the Problem Management group.

CREATE NEW PROBLEM

Use Case Name:	Create a New Problem
Description:	The creation of a new problem based upon investigation of a Support analyst.
Actors:	Incident Support Problem Manager Problem Support
Status:	Current

FREQUENCY

This use case is to be invoked every time a new Problem needs to be manually created.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- “Help Desk” has been selected from the Show menu.
- “Any” has been selected from the Console View menu.

- An Incident has been created.
- "Help Desk" has been selected from the Show menu.

POST CONDITIONS

- The Problem information is submitted into the Remedy Help Desk application and a Problem record is created. The Problem record is automatically assigned to the correct group with the skill set needed to resolve the incident.
- A relationship has been established between the Incident and Problem records.

ASSUMPTIONS

- There is a data form in Remedy with the individual's information.
- Within the Problem Management team, an individual has determined that a problem or unknown error may exist within the infrastructure.
- There is a data form with an assignment matrix which is based upon the Category, Type, Item, Region, Site and Department provided for the Help Desk categorization.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to create a new Incident/problem.
- The user has the correct permissions to create a new Incident/problem.
- The user has their Setup Personal Preference profile for 'Create Request Action' and 'Search for Request Action' set to "Open Selection Dialog". This will allow the requester to make a selection from the Select Request Type menu.

FORM NOTES

Help Desk Case Information form

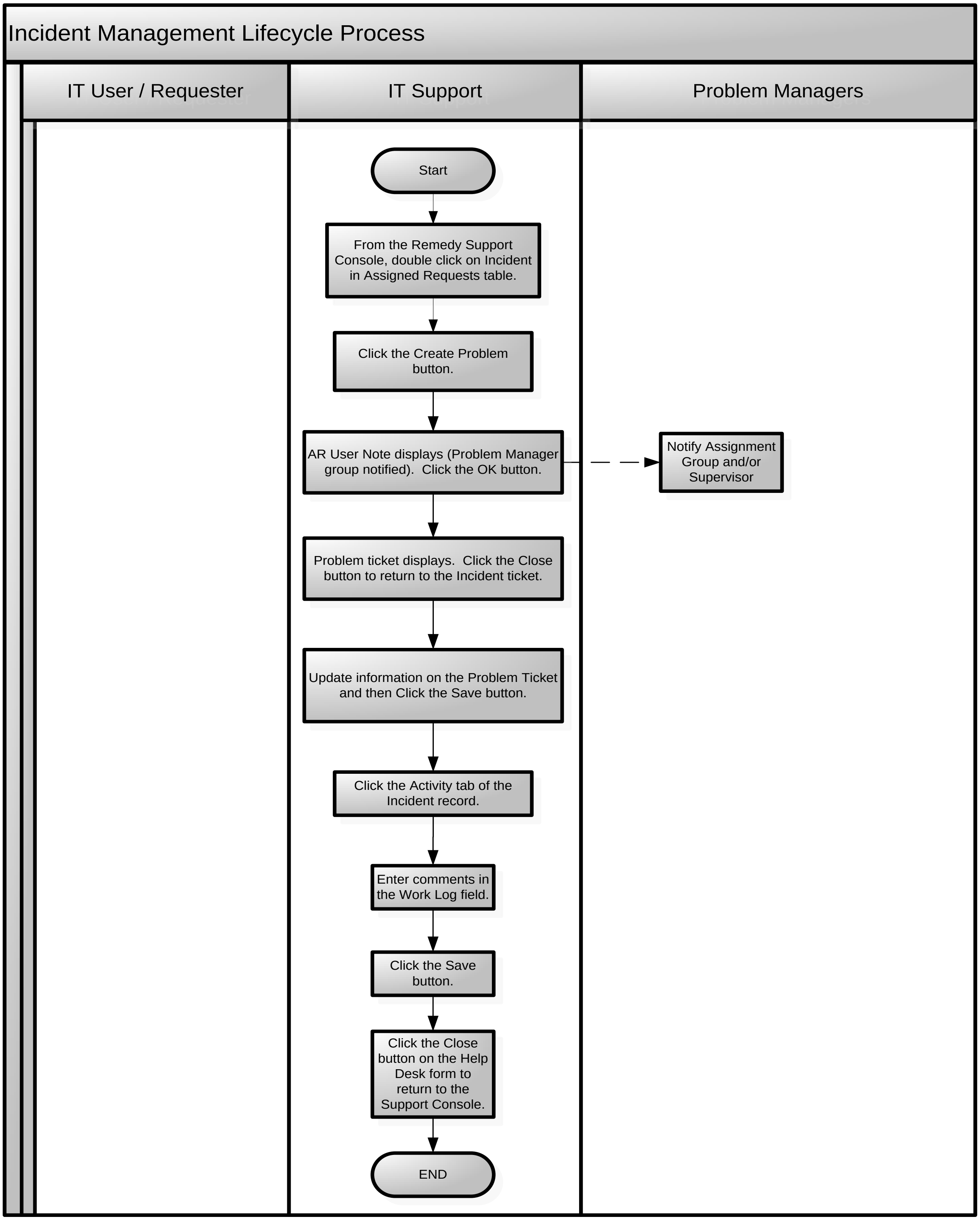
Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source, and Group.

BASIC COURSE OF ACTION

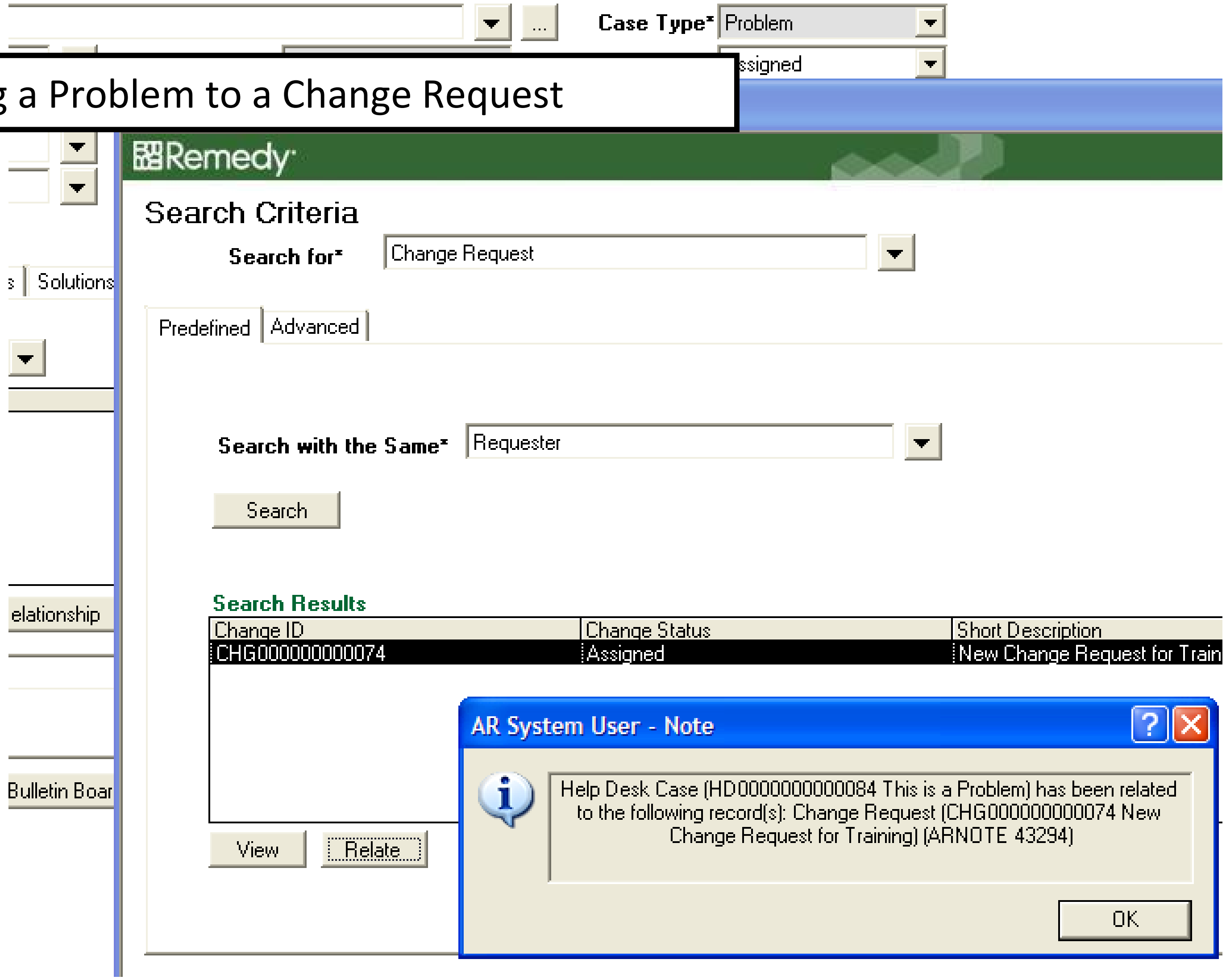
1) From the Remedy Support console, double click on the Incident in the Assigned Requests table. This will open the help desk form window with the Incident information populated.
2) Click on the Create Problem button at the bottom of the screen.
3) An AR System User Note message displays stating that the Problem Managers group has been notified of the newly created Problem.
4) A notification is sent to the Problem Management group. The ticket is automatically routed to the Problem Manager's group.
5) Click the OK button to close the message window. The Problem record displays.

   Note: The requester reflects the support person creating the ticket.
6) Update information on the problem ticket if needed.
7) Click the Save button.
8) Click the Close button to close the Problem ticket and return to the Incident ticket.
9) Click the Activity tab.
10) Enter comments in the Work Log field.
11) Click the Save button.
12) To return to the Remedy Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



Linking a Problem to a Change Request



LINKING A PROBLEM TO A CHANGE REQUEST

Use Case Name:	Link a Problem to a Change Request
Description:	Relating a Problem ticket to an existing Change Request.
Actors:	Problem Manager Problem Support
Status:	Current

FREQUENCY

This use case is to be invoked every time a Problem needs to be associated with a Change Request.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- “Help Desk” has been selected from the Show menu.
- “Any” has been selected from the Console View menu.
- A Problem ticket has been created.

- A Change Request has been created.
- The Problem ticket has been successfully related to a Change Request.

ASSUMPTIONS

- There is a data form in Remedy with the individual's information.
- Within the Problem Management team, someone has determined that a problem or unknown error may exist within the infrastructure.
- There is a data form with an assignment matrix which is based upon the Category, Type, Item, Region, Site and Department provided for the Help Desk categorization.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to edit an incident/problem.
- The user has the correct permissions to edit an incident/problem.

FORM NOTES

Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source, and Group.

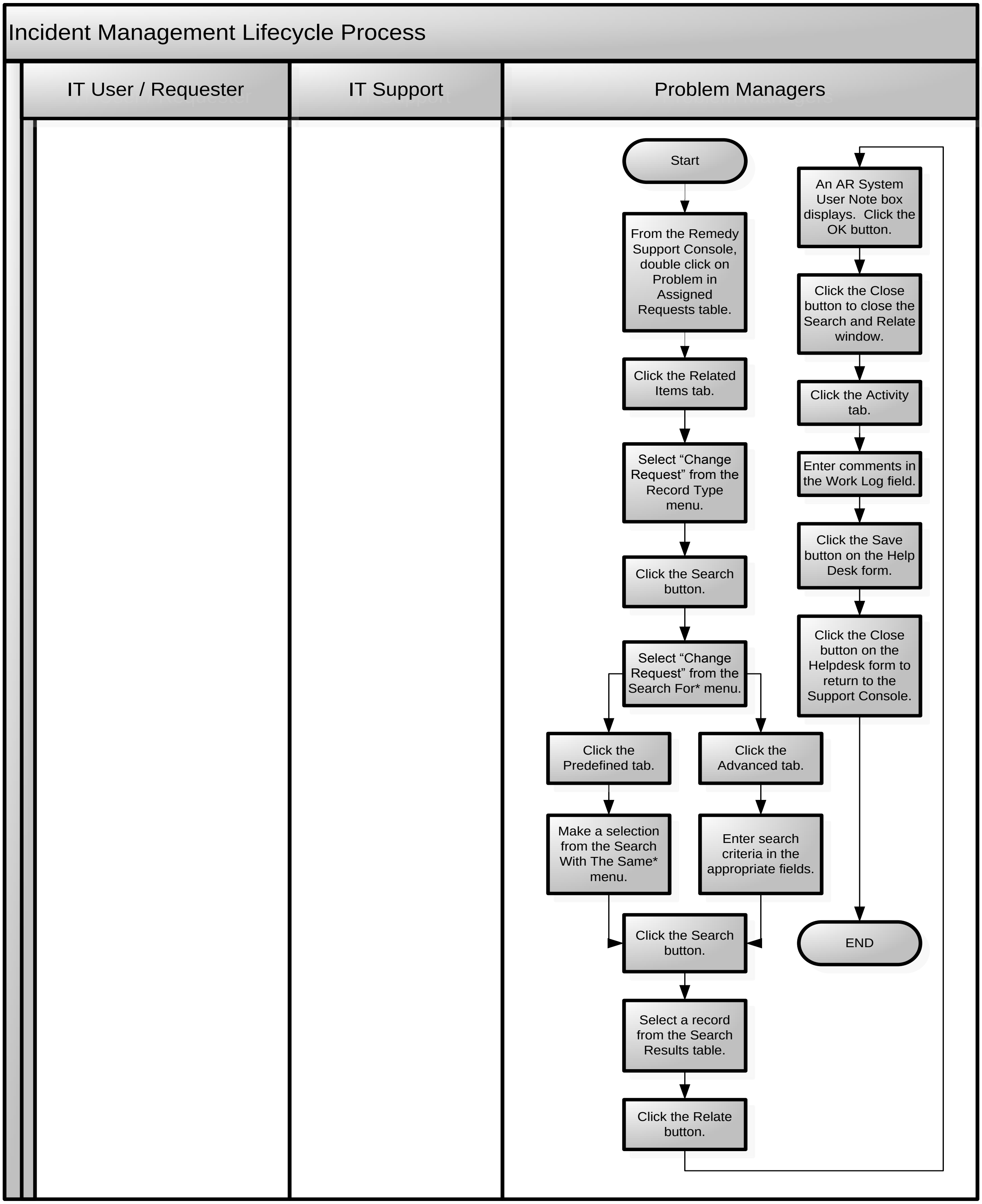
BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Problem record in the Assigned Requests table. This will open the Help Desk form window with the Problem information populated.
2) Click the Related Items tab.
3) Select “Change Request” from the Record Type menu located below the Current Relationships table.
4) Click the Search button. A ‘Search and Relate’ window will appear. This window will assist the user in locating the appropriate Change Request to relate/link to the Problem.
5) Select “Change Request” from the Search For* menu.
6) Click on the Predefined tab.
7) Make selection from the Search With The Same* menu.
8) Click the Search button. Matching records are returned in the Search Results table.
9) Select a record from the Search Results table.
10) (Optional) Click on the View button if further verification is required to determine if the correct Change record has been located.
11) Click on the Relate button. An AR System User-Note box displays stating that the Problem and the Change Requests have been related.
12) Click the OK button to close the AR System User-Note box.
13) Click the Close button to close the Search and Relate box.
14) Click on the Activity tab.
15) Enter comments in the Work Log field.
16) Click Save on the Help Desk screen.
17) To return to the Support Console screen, click on the Close button of the Help Desk form.

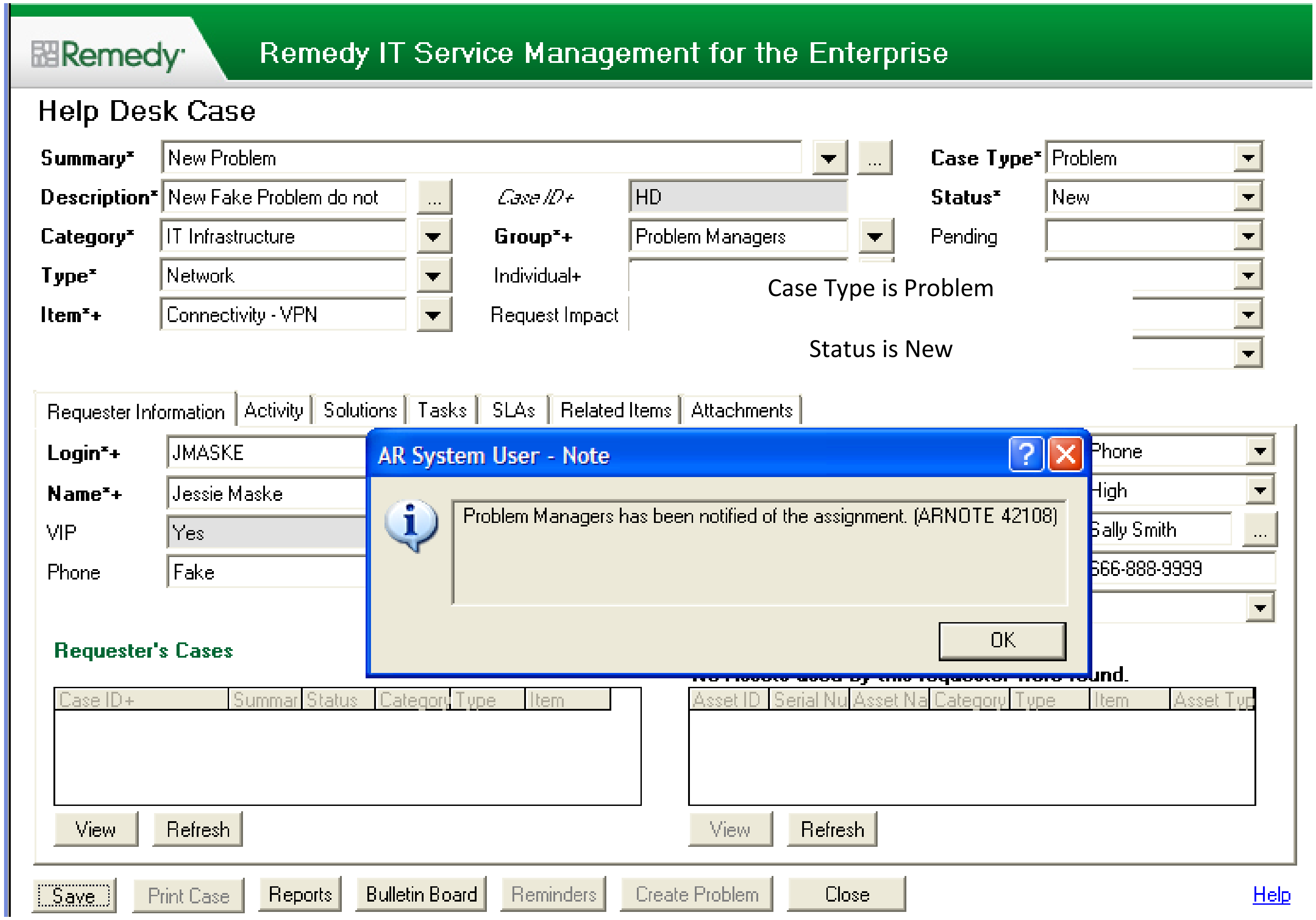
ALTERNATE COURSES OF ACTION

1) From the Remedy Support console, double click on the Problem record in the Assigned Requests table. This will open the Help Desk form window with the Problem information populated.
2) Click the Related Items tab.
3) Select “Change Request” from the Record Type menu located below the Current Relationships table.
4) Click the Search button. A ‘Search and Relate’ window will appear. This window will assist the user in locating the appropriate Change Request to relate/link to the Problem.
5) Select “Change Request” from the Search For* menu.
6) Click on the Advanced tab.
7) Enter the appropriate search criteria in any of the following fields: Category, Type, Item, Region, Site, Department, Requester+, Approval Status, Supervisor+, Supervisor Group+, Change Status.
8) Click the Search button. Matching records are returned in the Search Results table.
9) Select a record from the Search Results table.
10) (Optional) Click on the View button if further verification is required to determine if the correct Change record has been located.
11) Click on the Relate button. An AR System User-Note box displays stating that the Problem and the Change Requests have been related.
12) Click the OK button to close the AR System User-Note box.
13) Click the Close button to close the Search and Relate box.
14) Click the Activity tab.
15) Enter comments in the Work Log field.
16) Click Save on the Help Desk screen.
17) To return to the Support Console, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



CREATION OF A PROBLEM TICKET



ASSOCIATING A PROBLEM TO AN INCIDENT

Use Case Name:	Associate a Problem to an Incident
Description:	Associating a Problem to an Incident so that when the Problem is resolved, the associated Incidents will also be resolved.
Actors:	Problem Manager Problem Support
Status:	Current

FREQUENCY

This use case is to be invoked every time a Problem needs to be associated with an Incident.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- A Problem ticket has been created.

- An Incident ticket has been created with the same Category, Type, and Item as the Problem ticket.

POST CONDITIONS

- The Problem ticket has been successfully associated to an Incident.

ASSUMPTIONS

- There is a data form in Remedy with the individual's information.
- Within the Problem Management team, someone has determined that a problem or unknown error may exist within the infrastructure.
- There is a data form with an assignment matrix which is based upon the Category, Type, Item, Region, Site and Department provided for the Help Desk categorization.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to edit an incident/problem.
- The user has the correct permissions to edit an incident/problem.

FORM NOTES

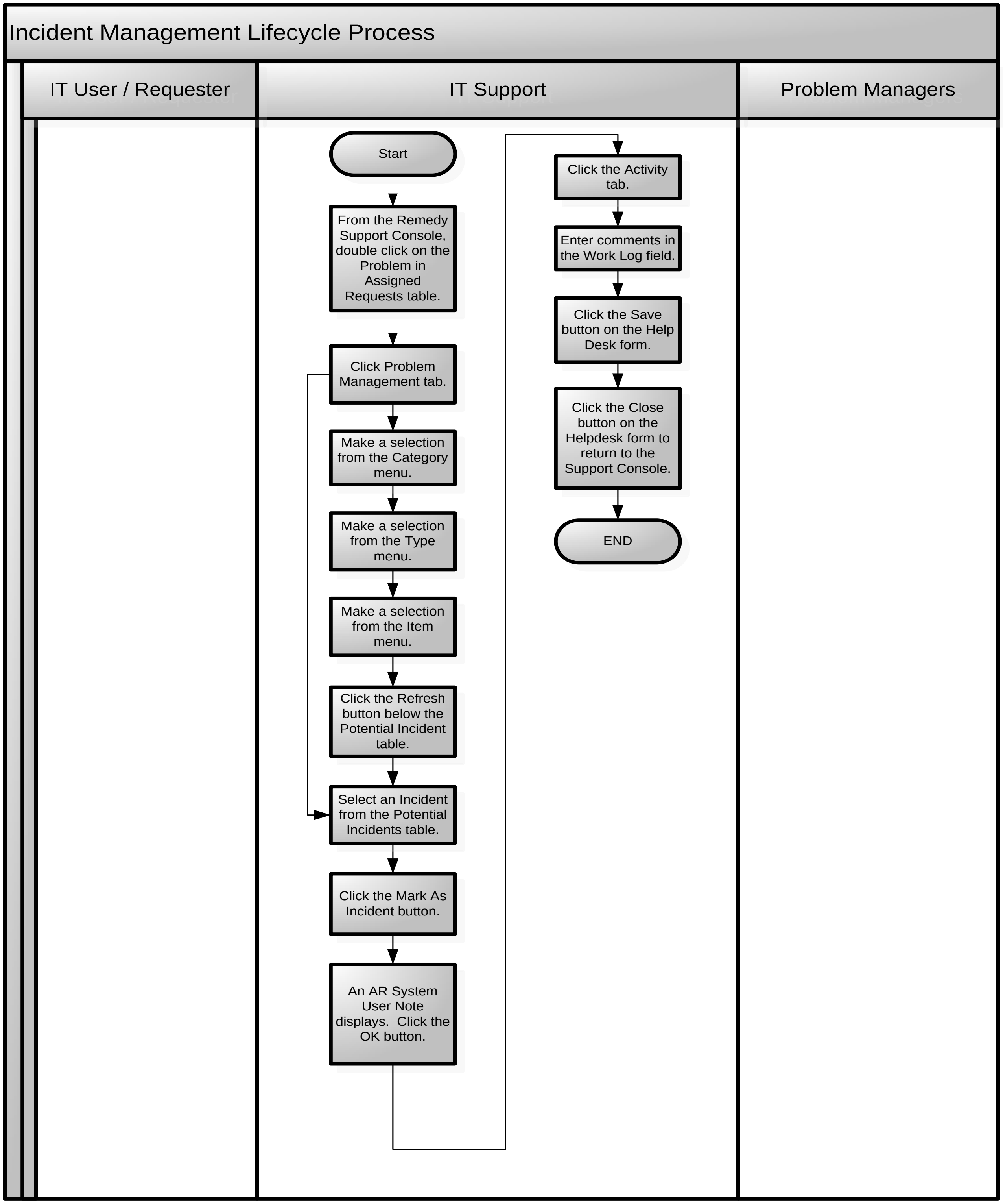
Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source, and Group.

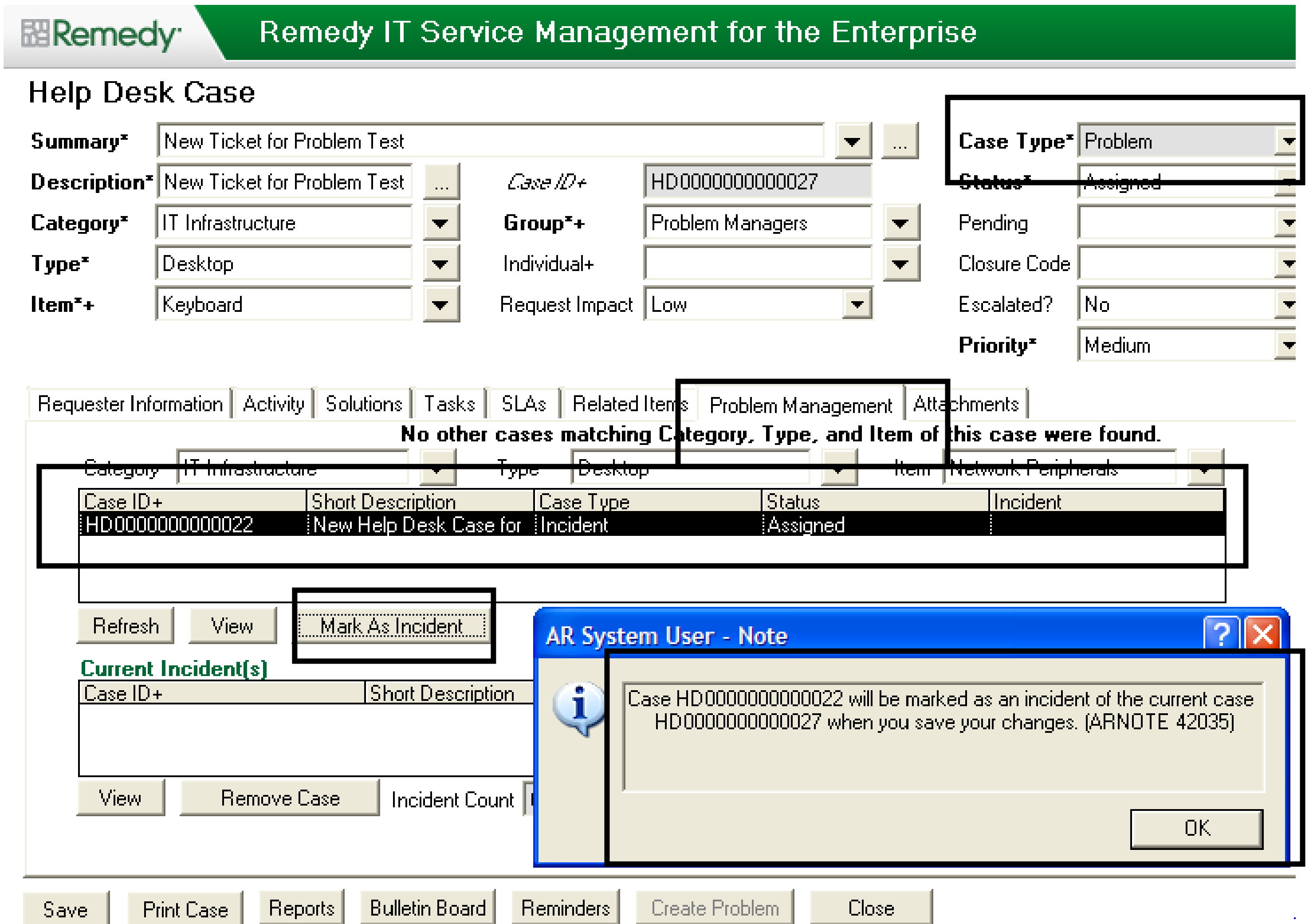
BASIC COURSE OF ACTION

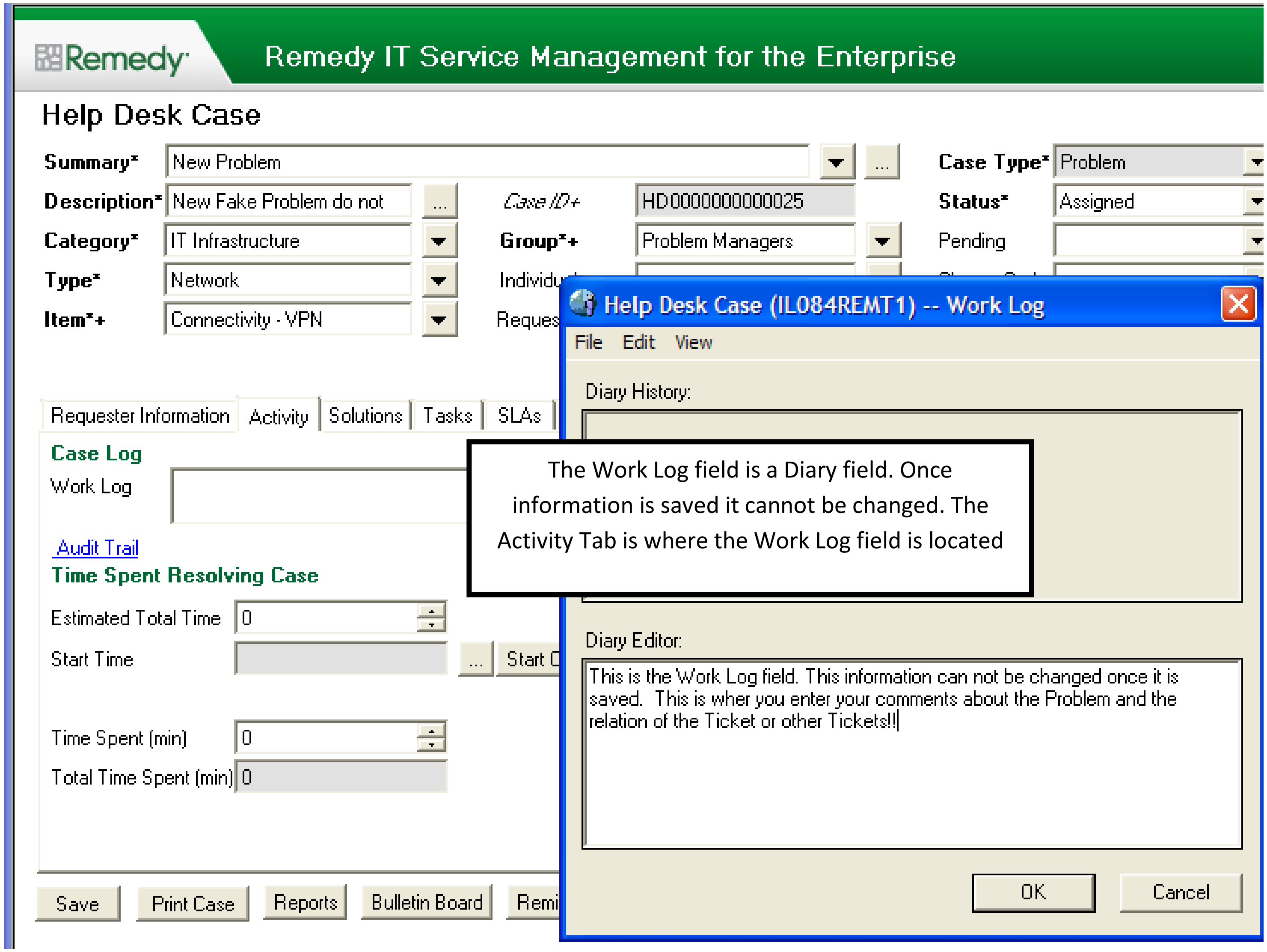
1) From the Remedy Support console, double click on the Problem record in the Assigned Requests table. This will open the Help Desk form window with the Problem information populated.
2) Click the Problem Management tab. Incidents that possess the same CTI as the current Problem will automatically appear in the Potential Incidents table.
3) (Optional) Make a selection from the Category menu.
4) (Optional) Make a selection from the Type menu.
5) (Optional) Make a selection from the Item menu.
6) (Optional) Click the Refresh button below the Potential Incidents table. Incidents that match the selections made in the Category, Type, and Item menus will display.
7) Select an Incident from the Potential Incidents table.
8) Click the Mark As Incident button.
9) An AR System User Note message displays indicating that the Problem and selected Incident will be associated when the Problem is saved.
10) Click the OK button.
11) Click the Activity tab.
12) Enter comments in the Work Log field.
13) Click the Save button.
14) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



RELATE TO AN INCIDENT




Remedy
Remedy IT Service Management for the Enterprise
Help Desk Case
Summary* New Problem
Case Type* Problem
Description* New Fake Problem do not
Case ID+ HD0000000000025
Status* Assigned
Category* IT Infrastructure
Group*+ Problem Managers
Pending
Type* Network
Item*+ Connectivity - VPN
Help Desk Case (IL084REMT1) -- Work Log
File Edit View
Diary History:
Requester Information Activity Solutions Tasks SLAs
Case Log
Work Log
The Work Log field is a Diary field. Once information is saved it cannot be changed. The Activity Tab is where the Work Log field is located
Audit Trail
Time Spent Resolving Case
Estimated Total Time 0
Start Time
Diary Editor:
This is the Work Log field. This information can not be changed once it is saved. This is wher you enter your comments about the Problem and the relation of the Ticket or other Tickets!!
Time Spent (min) 0
Total Time Spent (min) 0
Save
Print Case
Reports
Bulletin Board
OK
Cancel

RESOLVE A CASE

- When you finish working on a case, you must change its status to "Resolved". The requester is notified when a case is resolved. The requester can review the case and confirm its resolution by closing the case, or reopen it if the resolution is not satisfactory.

- If the requester does not close or reopen the case, the Help Desk module changes the status to "Closed" automatically (after THREE DAYS) and sets the Closure Code to Automatically Closed.

TO RESOLVE A HELP DESK CASE

1) Search for the case that you want to resolve, and open it.
2) The case appears.
3) To track the time you spend as you are resolving the case, click the Activity tab, and click the Start Clock button.
4) When you have resolved the case, select "Resolved" in the Status field.

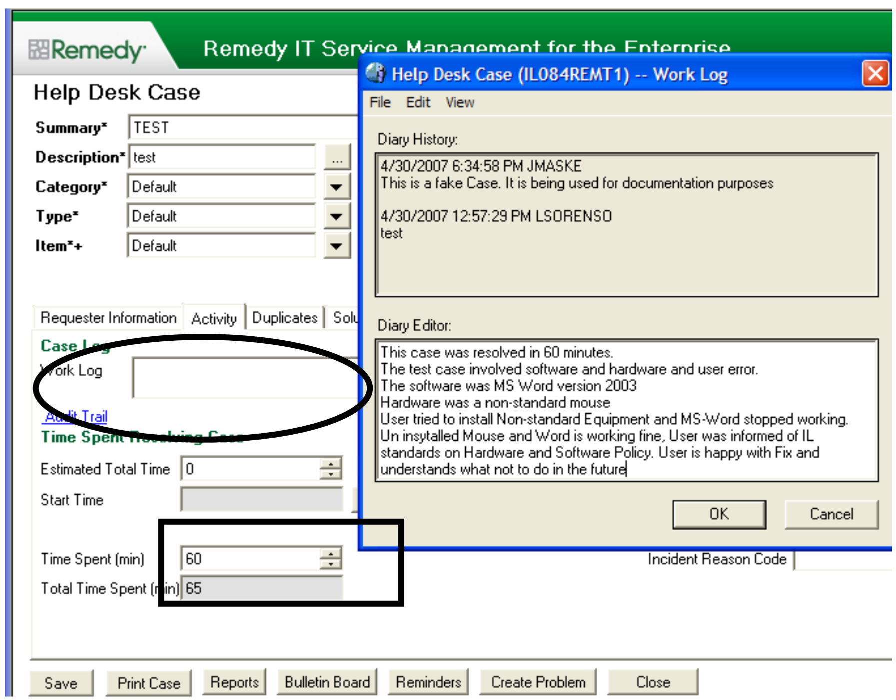
   The Status field defines the position of the request as it moves through its lifecycle. When the Incident has been fixed, the request should be given the status of "Resolved". To change the status of an Incident to "Resolved", click the Status field's associated menu and select "Resolved".
5) Click the Activity tab if it is not already displayed.

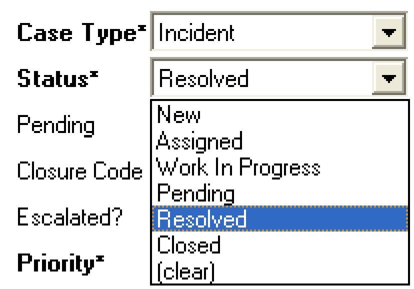
   Resolution Information: Once the status of the request has been changed to "Resolved", users will need to complete the Resolution fields on the Activity Tab. The Work log should also be updated with any additional information concerning the method of resolving or resolution details. Enter a description of how you resolved the case in the Work Log field.
6) In the Time Spent Resolving Case field, do either of the following:

If you used the clock, click the Stop Clock button. A message reports the total time spent. The total time spent is also entered in the read-only Total Time Spent field.

Otherwise, enter a number of minutes manually in the editable Time Spent field.

7) Click Save.





CREATE A RELATED ASSET RECORD

Use Case Name:	Create a Related Asset Record (Configuration Item)
Description:	This event is for Configuration Managers who require the ability to create an Asset Record (CI) while working with a Help Desk record
Actors:	Configuration Manager (Asset Management) or Help Desk assignee (with Configuration Management responsibilities)
Status:	Current

Frequency

- This use case would be invoked when a Configuration Manager requires a Configuration Items to be associated to a Help Desk record, and the Configuration Items doesn't exist within the Configuration Management Database (CMDB)

Preconditions

- The user is logged into the Remedy Help Desk application
- The user is at the IT Service Management Support Console form in Remedy
- The user has Configuration Management permissions and responsibilities

- The Configuration Item (CI) does not exist within the CMDB.

Post conditions

- A Configuration Item record is created within the correct CMDB Class.
- The Configuration Item (CI) is associated to a Help Desk record

Assumptions

- Person Information is stored in the SHR:People form in the Remedy Application
- The user has a valid login and password for the Remedy Help Desk application.
- The user has a valid login and password for the Remedy Asset Management application
- The user has the correct permissions to create/modify a Help Desk and an Asset Management / CMDB record.

Form Notes

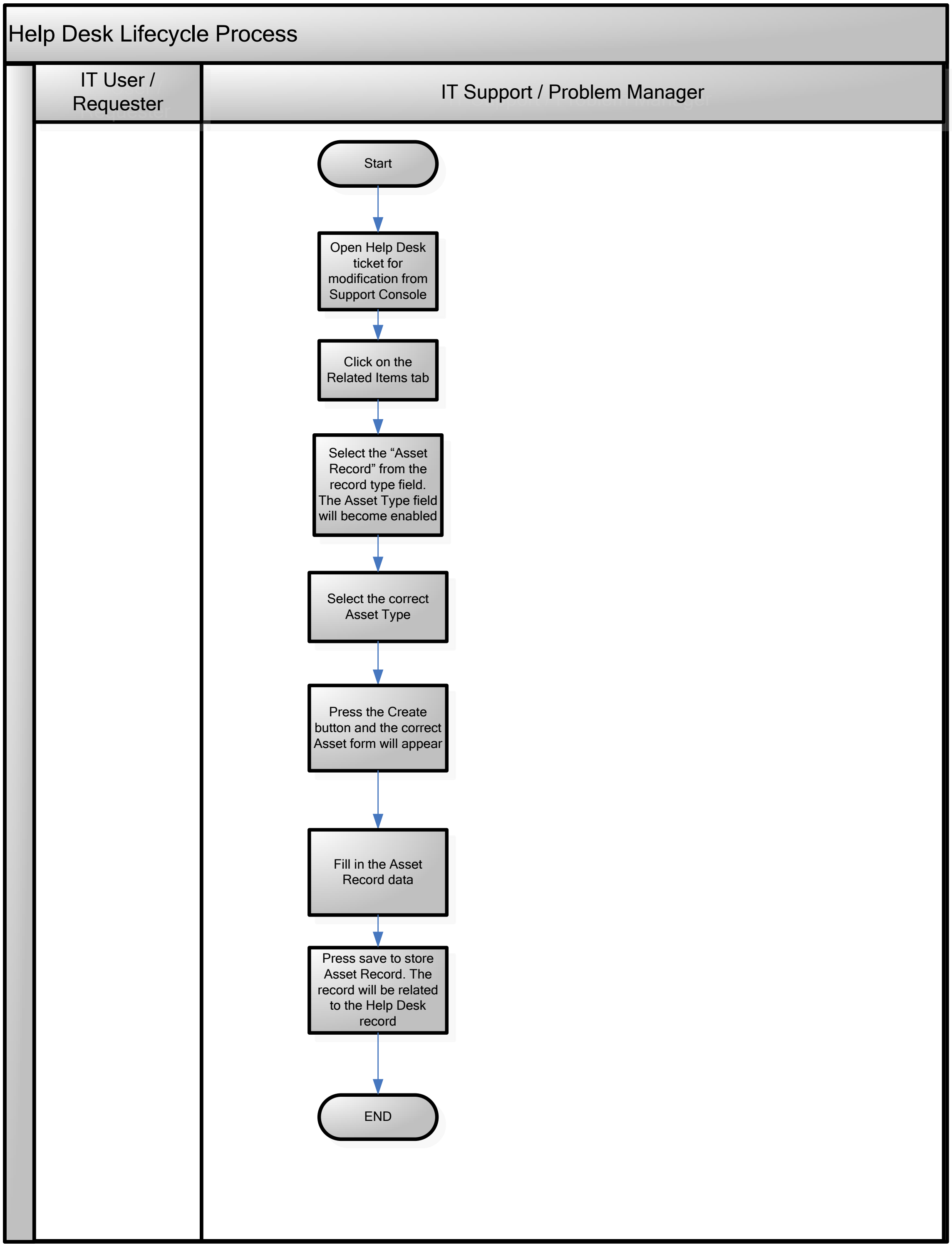
Configuration Management Database (CMDB)

The CMDB is divided into multiple classes (i.e. Computer Systems, Processors, etc.) with specific attributes for each class. Control of the CMDB should be limited to the Configuration Management team.

Basic Course of Action

1) From the Support Console, the Help Desk assignee (with Configuration Management responsibilities), opens a help desk record.
2) The user clicks the Related Items tab.
3) Within the Related Item tab, the user selects the value “Asset Record” from the Record Type field. Once selected the supporting field Asset Type is enabled.
4) Select the desired asset type (i.e. System – Computer System) from the Asset Type field.
5) Click the Create button (in the lower-right corner of the tab) and the asset form corresponding to the type you selected is displayed.
6) The user fills in the appropriate fields within the Asset record and presses save when the record is completed.
7) A message confirms that the new asset record you created has been related to the existing change request.

Create a Related Asset Record



RELATE AN ASSET RECORD

Use Case Name:	Relate an Asset Record (Configuration Item)
Description:	This event is used to relate an existing Asset Record (CI) to a Help Desk record
Actors:	Help Desk Assignee
Status:	Current

Note: Telecom will not be required to create Assets, they will be required to Relate an Asset when applicable.

Frequency

- This use case would be invoked when a Help Desk ticket assignee requires a Configuration Item (CI) to be associated to an Incident or Problem ticket.

Preconditions

- The user is logged into the Help Desk application
- The user is at the IT Service Management Support Console form in Remedy
- The user has permissions to view asset records
- The Configuration Item (CI) does exist within the CMDB.

Post conditions

- The Configuration Item (CI) is associated to an Incident or Problem record

Assumptions

- Person Information is stored in the SHR:People form in the Remedy Application
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct permissions to create/modify a Help Desk record.

Basic Course of Action

1) From the Support Console, Help Desk assignee opens a Help Desk record.

2) The user clicks the Related Items tab.

3) Within the Related Item tab, the user selects the value “Asset Record” from the Record Type field. Once selected the supporting field Asset Type is enabled.

4) Select the desired asset type (i.e. System – Computer System) from the Asset Type field.

5) Click the Search button (in the lower-right corner of the tab)

6) The ‘Search and Relate’ dialog appears.

7) The Search Results table by default lists Asset Records with the same Category, Type, and Item by default.

8) Choose an option for your search, either:

9) Search by Region, Site, Department OR

10) Search by Category, Type, Item, OR

11) Advanced search (where additional fields are provided to help narrow your search)
    Category
    Type
    Item
    Region
    Site
    Department
    Asset ID

Asset Name
Asset User
Asset Owner
Asset Manager

12) Click Search.

13) A list of records matching your search criteria appears.

14) To display the Asset Record select the appropriate item and click the View button.

15) When finished viewing the Asset Record click the Close button.

16) Select the Asset Record you want to relate to the Help Desk record (To select multiple records hold down the Shift key and Left Click the mouse).

17) Click Relate.

18) Click OK to confirm selection.

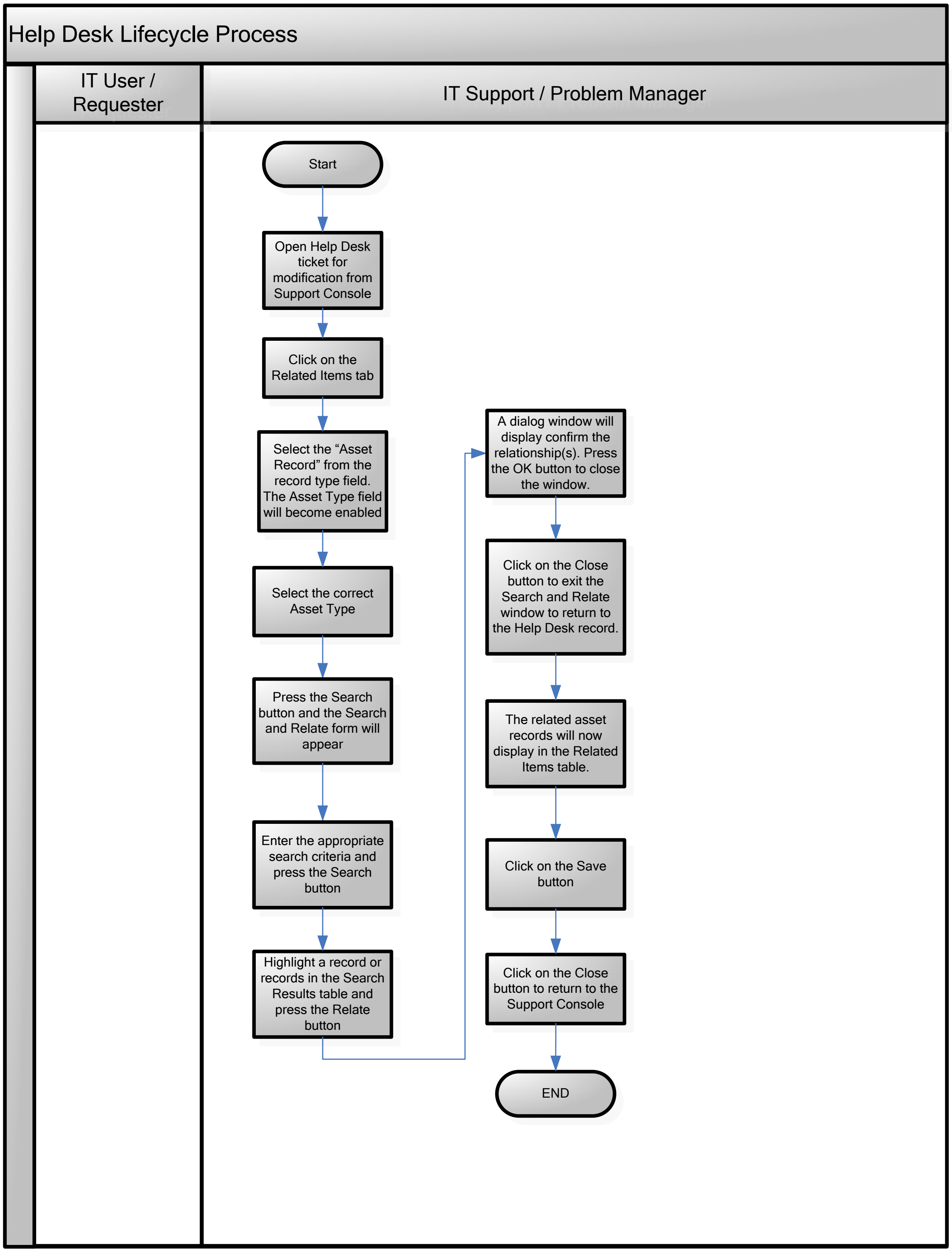
19) Click the Close button to close the ‘Search and Relate’ dialog box.

20) The Asset Record(s) now appears in the Related Items table.

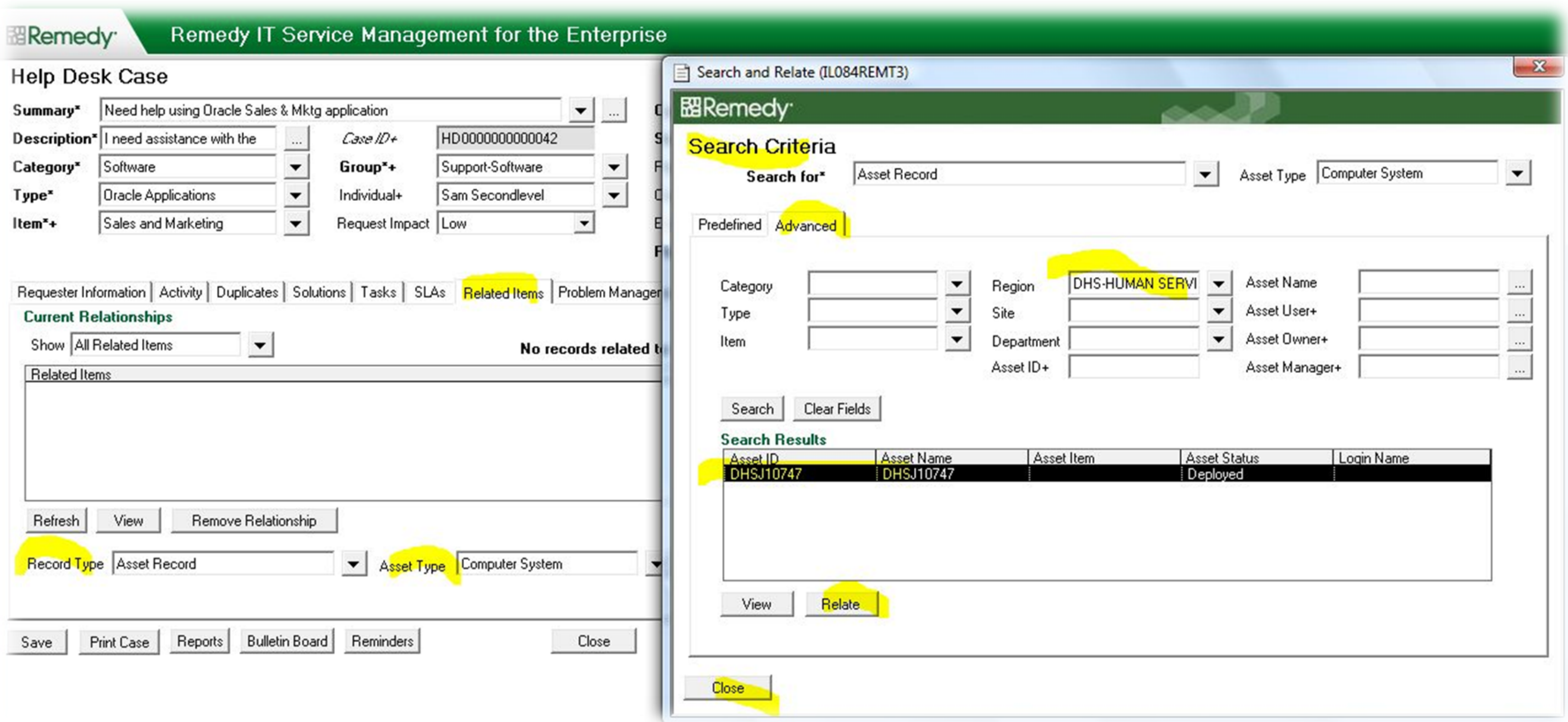
21) Click on the Save button to confirm changes.

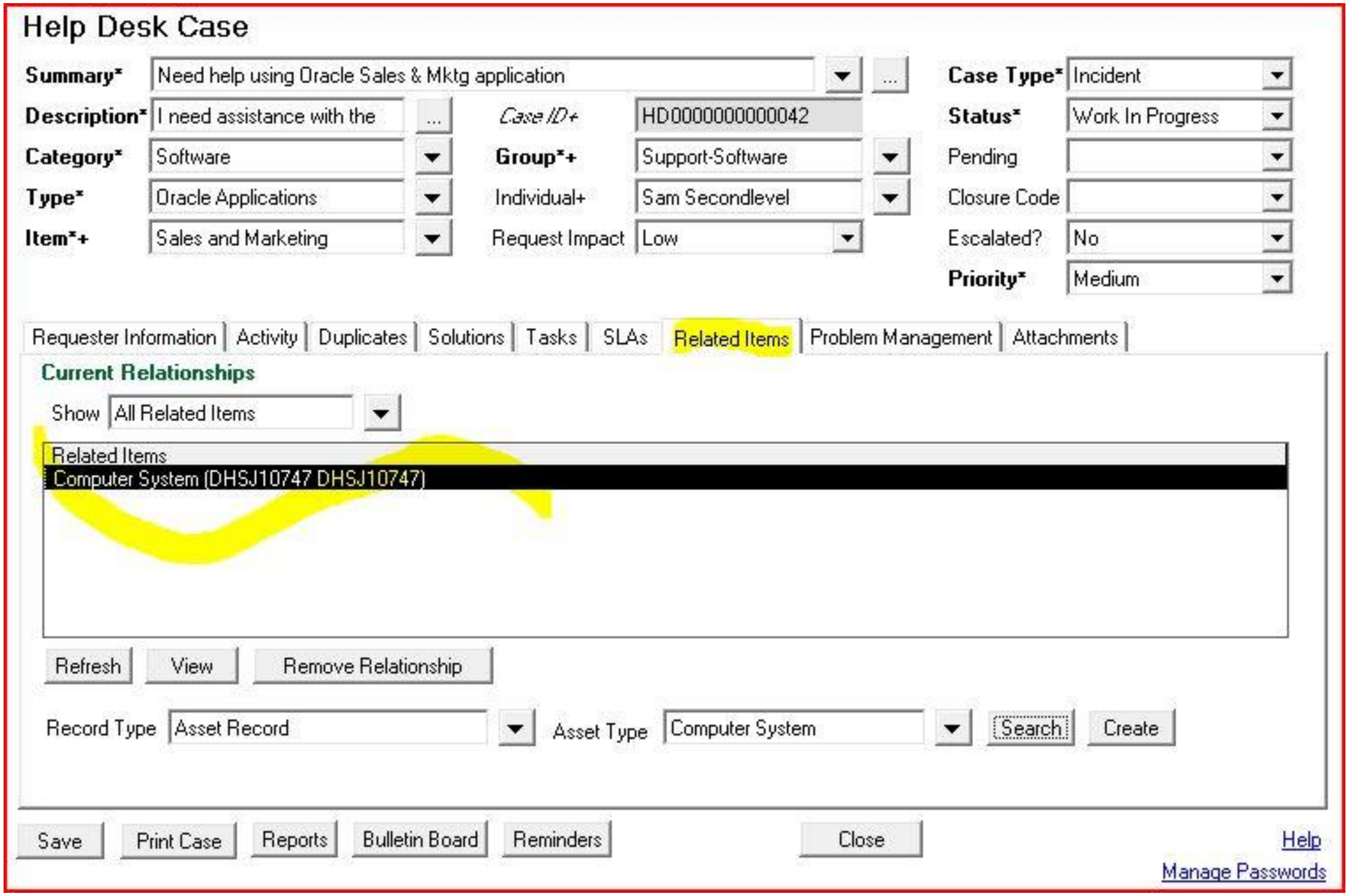
22) Click the Close button – User is returned to the Remedy Support Console.

Use Case Process Diagram



RELATE AN ASSET TO AN INCIDENT




Help Desk Case
Summary* Need help using Oracle Sales & Mktg application
Case Type* Incident
Description* I need assistance with the
Case ID+ HD0000000000042
Status* Work In Progress
Category* Software
Group*+ Support-Software
Pending
Type* Oracle Applications
Individual+ Sam Secondlevel
Closure Code
Item*+ Sales and Marketing
Request Impact Low
Escalated? No
Priority* Medium
Requester Information | Activity | Duplicates | Solutions | Tasks | SLAs | Related Items | Problem Management | Attachments
Current Relationships
Show All Related Items
Related Items
Computer System (DHSJ10747 DHSJ10747)
Refresh
View
Remove Relationship
Record Type Asset Record
Asset Type Computer System
Search
Create
Save
Print Case
Reports
Bulletin Board
Reminders
Close
Help
Manage Passwords

VIEW AN EXISTING RELATED ASSET RECORD

Use Case Name:	View an existing Related Asset Record (Configuration Item)
Identifier:	UC-HD55
Description:	This event is for Help Desk assignee who needs to view assets associated to the Help Desk record.
Actors:	Help Desk assignee
Status:	Current

Frequency

- This use case would be invoked when a Help Desk assignee would need to review assets associated to a Help Desk record

Preconditions

- The user is logged into the Remedy Help Desk application
- The user is at the IT Service Management Support Console form in Remedy
- The user has App-Support permissions and responsibilities
- The Configuration Item (CI) exists within the CMDB.

Post conditions

- The assignee reviewed associated Assets

Assumptions

- Person Information is stored in the SHR:People form in the Remedy Application
- The user has a valid login and password for the Remedy Help Desk application
- The user has the correct permissions to create/modify a Help Desk record.

Form Notes

Configuration Management Database (CMDB)

The CMDB is divided into multiple classes (i.e. Computer Systems, Processors, etc.) with specific attributes for each class. Control of the CMDB should be limited to the Configuration Management team.

Basic Course of Action

1) From the Support Console, the Help Desk assignee opens a help desk record.

2) Click the Related Items tab.

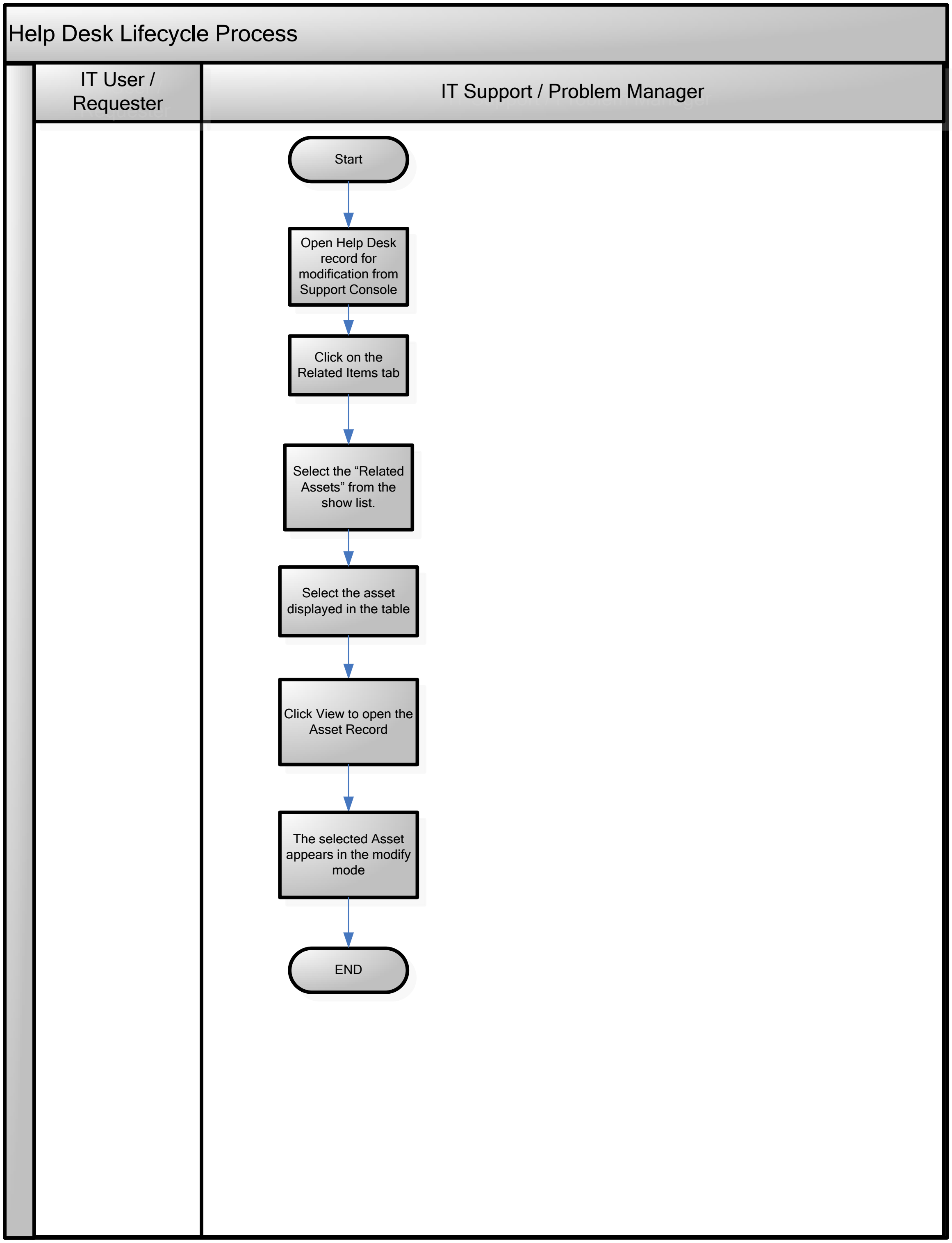
3) Select “Related Assets” from the Show list. The related assets, not including services and configurations, are displayed in the table. (Services and configurations are listed separately in the Show menu.)

4) Select the asset displayed in the table.

5) Click View.

6) The selected Asset record will open in a modify mode.

Use Case Process Diagram



UN-RELATE AN ASSET

Use Case Name:	Un-relate an Associated Asset
Description:	This event is for the Help Desk assignee who needs to remove an associated asset to a Change Request
Actors:	Help Desk Assignee
Status:	Current

Frequency

- This use case would be invoked when a Help Desk Assignee needs to remove an associated asset from a Help Desk record.

Preconditions

- The user is logged into the Remedy Help Desk application
- The user is at the IT Service Management Support Console form in Remedy
- The user has App-Support permissions and responsibilities
- A Help Desk record has an associated asset record

Post conditions

- The associated asset record is removed from the Help Desk record

Assumptions

- Person Information is stored in the SHR:People form in the Remedy Application
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct permissions to create/modify a Help Desk record
- An asset is associated to the Help Desk record.

Basic Course of Action

1) From the Support Console, open a help desk record

2) Click the Related Items tab.

3) In the Show field, select "Related Assets" from the list. The table lists all the related assets.

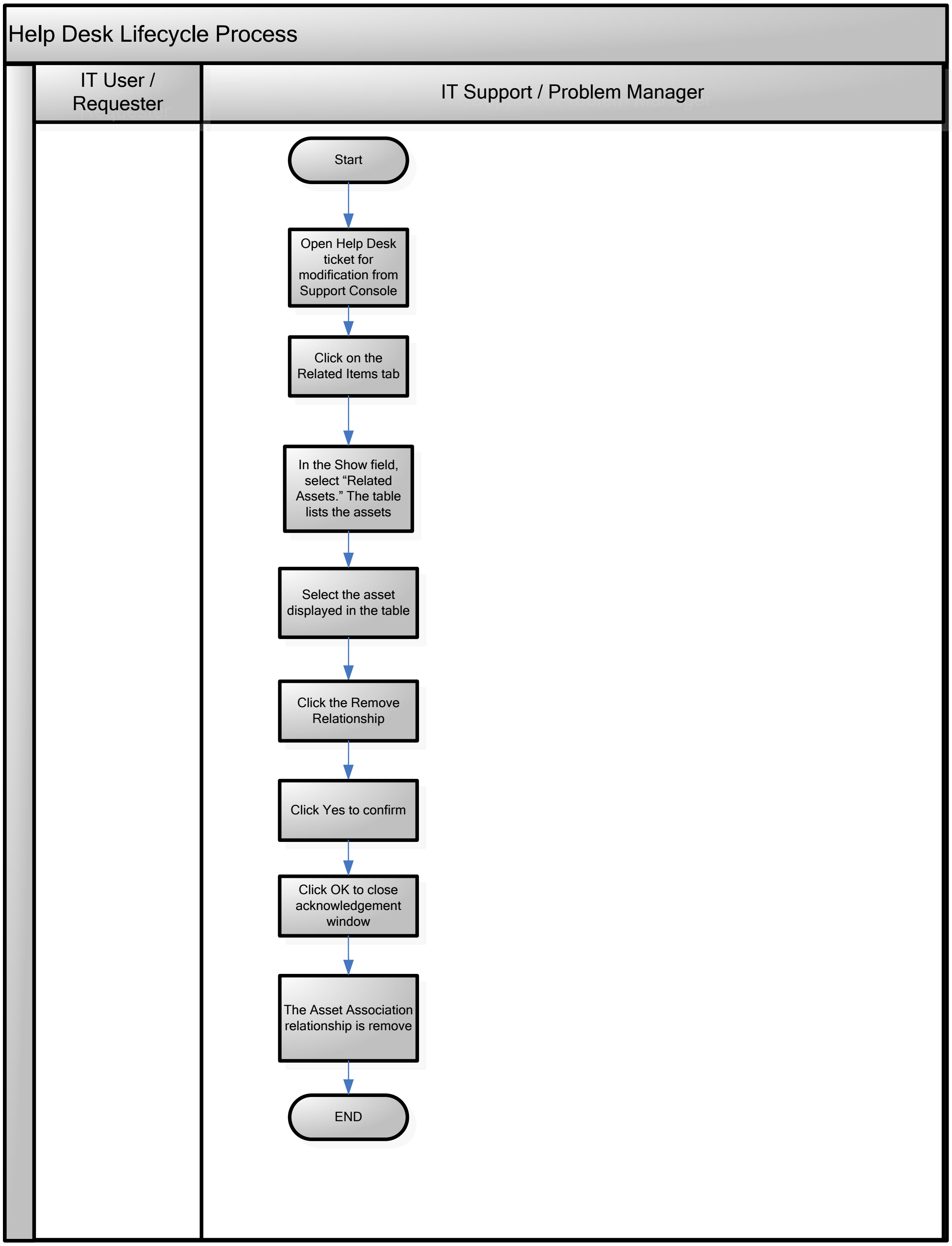
4) The user selects the asset record that needs to be removed from the association.

5) The user clicks the Remove Relationship.

6) A confirmation message appears to confirm the relationship removal

7) If the user clicks yes, the asset is removed from the association.

Use Case Process Diagram



RELATING AN EXISTING HELP DESK CASE OR CHANGE REQUEST TO AN ASSET

You can relate an existing help desk case or change request to the current asset from the Related Items tab on the asset record.

For example, a support technician might create a new help desk case about a printer being down. The technician can use the asset record in Remedy Asset Management to open the asset record for the printer and relate the help desk case to it.

Or, if a change request requires installing a part for a printer, a technician can relate the asset record to the change request when the part is received.

To relate an existing help desk case or change request to an asset:

1) Search for the asset and open it.
2) Click the Related Items tab.
3) From the Record Type list, select Help Desk Case or Change Request.
4) Click Search.
5) The Search and Relate dialog box appears.
6) The Search results appear in the table. The Search For field contains Help Desk Case by default. The Search with the Same field contains Category, Type, and Item by default.
7) Choose an option for your search.
8) For a predefined search, select different search criteria from the Search with the Same list.

Type of search	Description
Search with the Same Region, Site, and Department	Searches for help desk cases or change requests with the same site, region, and department as the asset record.
Search with the Same Category, Type, and Item	Searches for help desk cases or change requests with the same category, type, and item as the asset record.

12) For an advanced search, click the Advanced tab and enter additional search criteria to narrow your search.

13) Click Search.

14) A list of records matching your search criteria appears in the Search Results table.

15) To display the help desk case or change request, select the appropriate item and click View.

16) Close the help desk case or the change request.

17) If you want to relate an existing help desk case to the asset record, select the item from the Search Results table and click Relate.

18) A confirmation message appears.

19) Click OK.

20) Click Close to close the Search and Relate dialog box.

21) The help desk case or change request you related appears on the Related Items tab.

REMOVING A HELP DESK CASE OR CHANGE REQUEST FROM AN ASSET

You might sometimes find that help desk cases or change requests are related to asset records by mistake. You can use the Related Items tab on the asset record to remove help desk cases or change requests from the current asset record.

To remove a help desk case or change request from an asset:

1) Search for the asset record and open it.
2) Click the Related Items tab.
3) From the Show list, select Related Help Desk Cases or Related Change Requests.
4) A list of records matching your search criteria appears in the Search Results table.
5) Select the help desk case or change request you want to remove from the asset.
6) Click Remove.
7) A confirmation message appears.
8) Click Yes.
9) The help desk case or change request is removed from the table.

VIEWING HELP DESK CASES OR CHANGE REQUESTS RELATED TO AN ASSET

You can view help desk cases or change requests related to the current asset from the Related Items tab on an asset record.

For example, an IT technician might receive a laptop that needs repair, but the does not know the details of the reported problem. The technician can view the help desk case or change request from the Related Items tab of the asset record.

To view help desk cases, or change requests related to an asset record:

1) Search for the asset record and open it.
2) Click the Related Items tab.
3) From the Show list, select Related Change Requests or Related Help Desk Cases.
4) The related items appear in the Related Items table.
5) To view the details of the item, select the item from the table and click View.

RESOLVE AN INCIDENT

Use Case Name:	Resolve an Incident
Description:	The resolution of an incident that was created and auto assigned to a group with the skills to resolve the incident. There are no escalations or reassignments and the incident is resolved by the support group/individual.
Actors:	Incident Support Incident Manager
Status:	Current

Business Rules associated with Service Request Close-Out Activities (Status=Resolved)

Help Desk tickets will not automatically close after the last task is completed in 3 days (Change System tickets will automatically close after the last task is closed in three days), Help Desk tickets should not be closed but set to Resolved, and that is only after the Incident has been verified with the customer that it has been resolved. This notation Must be included in the Work Log. This will apply when the technician is not on the phone with the customer.

Description: Shared service technician completes all related activities and Resolves the last Task of a request

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
13a	Technician ensures all work activity has been completed and status for each task has been Closed	RESOLVED	Shared Service Technician	Completes all work activity, updates the work-log and changes status for all assigned Task(s) to Closed	Shared Service Technician is responsible for providing updates the work-log and changes status of each assigned Task to Closed

13b	Technician ensures all work activity for service requests with no assigned Tasks have been completed, and manually changes the Status of the request to Resolved	RESOLVED	Shared Service Technician	Updates the work-log and changes status of service request to Resolved	Shared Service Technician is responsible for all work activity and necessary customer follow-up to verify completion of the service request before changing the status of the request manually to Resolved. Shared Service Technician is responsible to identify if the customer would like to perform a Cost Analysis related to the service request and to ask to open the inquiry by calling the Service Desk

Frequency

- This use case is to be invoked every time an Incident, Question or Request needs to be resolved.

Preconditions

- The user is logged into the Remedy Help Desk application
- The user is at the IT Service Management Support Console form in Remedy
- An Incident has been created.

Post conditions

- The Incident is resolved and the person reporting the Incident (Requester) has verified that the Incident is resolved

Assumptions

- The Incident has all required data elements/fields completed
- The user has a valid login and password for the Remedy Help Desk application
- The user has the correct licensing to resolve an Incident
- The user has the correct permissions to resolve an Incident
- A Solution record exists that matches the Category, Type, and Item of the Incident
- If associated Tasks exist, they all have successfully closed.

Form Notes

Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source, and Group.

BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.

2) Select "Resolved" from the Status* menu.

3) Click the Solutions tab.

4) Make a selection from the Summary menu (Proceed to Step 6) or enter a summarized description of the solution in the field (Proceed to Step 5).

5) Enter a detailed description of the solution in the Details field.

6) Make a selection from the Root Cause menu.

7) Enter comments in the Resolution Method field.

8) Click the Activity tab.

9) Enter comments in the Work Log field.

10) (Optional) Enter the amount of time spent working the Incident in the Time Spent (min) field.

11) Click the Save button.

12) An AR System User Note message displays indicating that the requester has been notified of the case's resolution.

13) Click the OK button.

14) To return to the Support Console screen, click on the Close button of the Help Desk form.

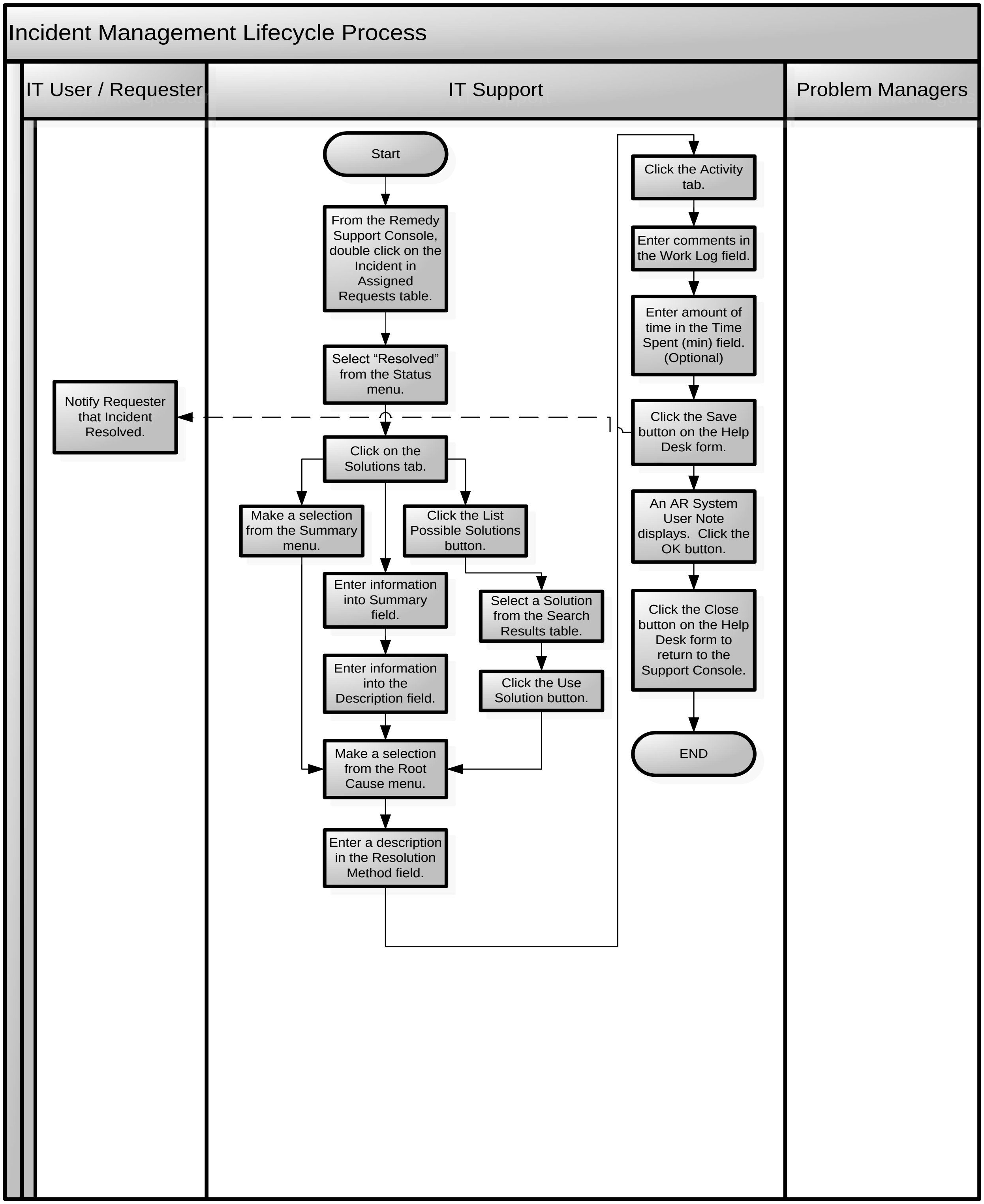
Alternate Courses of Action

From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the help desk form window with the Incident information populated.

1) Select “Resolved” from the Status* menu.
2) Click the Solutions tab.
3) Click the List Possible Solutions button. The Search Solutions window is displayed with a list of all possible solutions that match the request Category, Type and Item. Note: The List Possible Solutions button will be disabled if there are no solutions to match the Category, Type, and Item.
4) Select a Solution in the Search Results table.
5) Click the Use Solution button. The Search Solutions window will close returning to the Help Desk form and automatically populate the Summary and Details fields with the solution information.
6) Make a selection from the Root Cause menu.
7) Enter comments in the Resolution Method field.
8) Click the Activity tab.
9) Enter comments in the Work Log field.
10) (Optional) Enter the amount of time spent working the Incident in the Time Spent (min) field.
11) Click the Save button.
12) An AR System User Note message displays indicating that the requester has been notified of the case’s resolution.
13) Click the OK button.

14) To return to the Support Console screen, click on the Close button of the Help Desk form.

Use Case Process Diagram



Performing a customer Escalation relating to a Service Request (Status=Scheduled, Pending or Work In Progress)

Description: Customer calls the Service Desk and requests an Escalation to an open Service Request

STEP	OBJECTIVE(S)	REQUEST STATUS	RESPONSIBLE AREA	ACTIVITIES	BUSINESS RULES
8a	Task Coordinator or Requested By calls on behalf of the Requester to the Service Desk and asks to speak to a Service Desk Supervisor to request an Escalation of the Service Request	SCHEDULED PENDING WORK IN PROGRESS RESOLVED	Requested By	• Consults with Requester to determine a need to request an Escalation • Contacts the Service Desk and asks to speak to a Service Desk Supervisor to request an Escalation relating to a Service Request in Scheduled, Pending, Work In Progress, or Resolved status	• Task Coordinator or Requested By is Responsible for contacting the CMS Service Desk to initiate the Escalation of a service request • Task Coordinator or Requested By is responsible for providing information, details and / or justification relating the business need to perform an Escalation for the service request • Task Coordinator or Requested

				• Provides details or justification to the Service Desk on the nature of the Escalation	By is responsible to initiate the Escalation while the service request is in either a Scheduled, Pending, Work In Progress or Resolved status. • **Note:** When the request is in CLOSED Status, the request cannot be re-opened. A New service request or an Incident should be opened and related to the Closed service request.
8b	Service Desk performs an Escalation on behalf of the customer to the Shared Service Manager of the Assigned Group associated to the service request	SCHEDULED PENDING WORK IN PROGRESS	Service Desk Supervisor	• Consults with Task Coordinator or Requested By to determine the need or scope of Escalating the request	• Service Desk Supervisor is responsible for consulting with the Task Coordinator or Requested By and will determine if the need to set an Escalation is necessary

		RESOLVED		• Determines the Action Items that are mandatory to complete in follow up with the Customer • Changes the Priority and Urgency or the Service Request to Urgent • Changes the Escalated field in the Service request from No to Yes • Contacts the Assignment Group Manager or Supervisor and identifies all Action Item follow up steps with the customer	• Service Desk Supervisor is responsible for changing the Priority and Urgency in the service request to Urgent if there is an Escalation • Service Desk Supervisor is responsible for changing the Escalated field from No to Yes in the service request • Service Desk Supervisor is responsible for contacting the Assignment Group Manager or Supervisor directly to consult with them on the details and to set expectations on the Action Item follow up with the Customer • Service Desk Supervisor is responsible for entering into

				•	the work-log all details in the steps required to satisfy the customer into the service request
8c	Shared Service Manager is provided details on the customer Escalation of a service request and performs all follow up Action Items as established by the Service Desk Supervisor	SCHEDULED PENDING WORK IN PROGRESS RESOLVED	Shared Service Manager	• Informed by Service Desk Supervisor on the details of an Escalated service request • Completes all Action Items in follow up with the Customer as identified by the Service Desk Supervisor	• Shared Service Manager is responsible for reviewing the details of the service request and taking immediate steps to perform Action Item follow up in response to the Escalation • Shared Service Manager is responsible for contacting the Task Coordinator or Requested By, and provides details on the necessary steps taken to Resolve the Escalated service request • Shared Service Manager is responsible for ensuring work-

					log details are documented after all Resolution steps are completed • Shared Service Manager is responsible to ensure the service request is Resolved in a timely manner as specified by the Service Desk Supervisor

RESOLVE AN INCIDENT – FIRST CALL

Use Case Name:	Resolve an Incident
Description:	The resolution of an incident that was created and assigned to a group with the skills needed to resolve the incident. There are no escalations or reassignments and the incident is resolved by the support group/individual.
Actors:	Incident Support Incident Manager
Status:	Current

FREQUENCY

This use case is to be invoked every time an Incident, Question or Request needs to be resolved on the first call.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.

POST CONDITIONS

- The incident is resolved when the person taking the call resolves the Requester's issue within the time span of the first phone call.

ASSUMPTIONS

- There is a data form in Remedy with the individual's information.
- The incident has all required data elements/fields completed.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to resolve an Incident.
- The user has the correct permissions to resolve an Incident.
- The user has their Setup Personal Preference profile for 'Create Request Action' and 'Search for Request Action' set to "Open Selection Dialog". This will allow the requester to make a selection from the Select Request Type menu.

FORM NOTES

Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source and Group.

BASIC COURSE OF ACTION

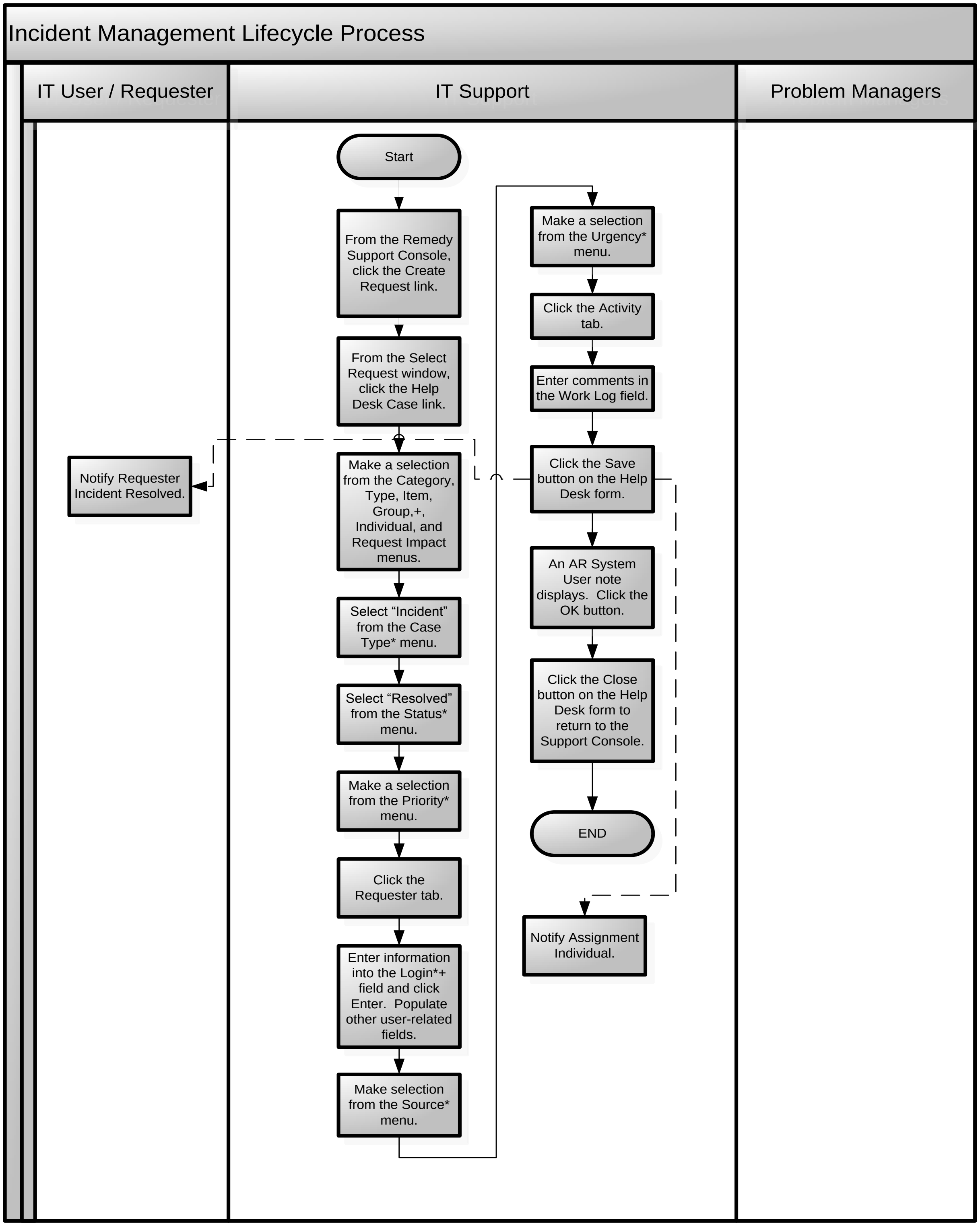
First Call Resolution: This can often take place within the first level support team while on the phone with ticket requesters.

1) From the Remedy Support Console, click on the Create Request link. This will open a Select Request window where the end user will select the type of request they wish create.
2) Click the Help Desk Case link.
3) Make a selection from the Summary* menu (Proceed to Step 8) OR enter information into the field manually (Proceed to Step 4).
4) Enter a description of the Incident (if it is different than the Summary* information) in the Description* field.
5) Make a selection from the Category* menu.
6) Make a selection from the Type* menu.
7) Make a selection from the Item* menu.
8) Make a selection from the Group+ menu.
9) Make a selection from the Individual+ menu.
10) (Optional) Make a selection from the Request Impact menu.
11) Select “Incident” from the Case Type* menu.
12) Select “Resolved” from the Status* menu.
13) Make a selection from the Priority* menu.
14) Click the Requester tab.
15) Enter a partial or full network login id in the Login*+ field and click Enter. If only one match is found, the Requester-related fields will be automatically populated with the Requester information. If more than one match is found, a list will appear for the user to select from.
16) (Optional) With the Login*+ field blank, click Enter. A Search People window will open with searchable fields (Search Criteria) to help the user search for the Requester’s data. Enter the appropriate search criteria and click the Search button. The Search Results table below will

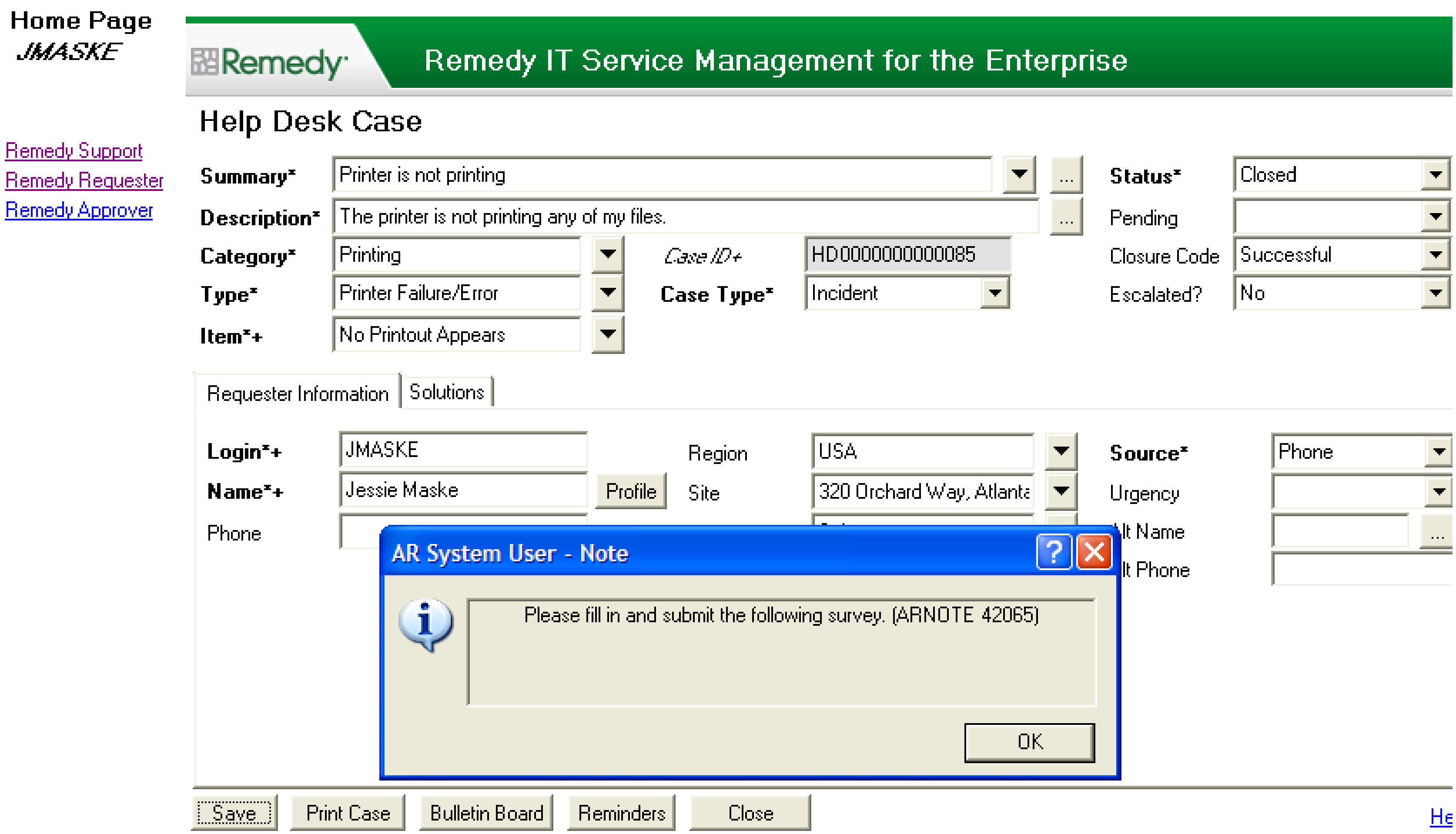
return matching records. Select a record and click the OK button. The Search People window will close and the Requester-related fields will be automatically populated with the Requester's information.

17) Verify the Name*+ field is populated. If the field is not populated, enter a partial or full Requester name in the Name*+ field and click Enter. If only one match is found, the Requester-related fields will be automatically populated with the Requester information. If more than one match is found, a list will appear for the user to select from.
18) Make a selection from the Source* menu.
19) (Optional) Make a selection from the Urgency menu.
20) Click the Activity tab.
21) Enter comments in the Work Log field.
22) Click the Save button.
23) An AR System User Note displays stating that the Request and Assignee have been notified that the Incident is resolved.
24) Click the OK button.
25) To return to the Remedy Support console, click the Close button on the Help Desk form.

Use Case Process Diagram



Close an Incident



CLOSE AN INCIDENT

Use Case Name:	Close an Incident-
Description:	The closing of an incident by a Support user.
Actors:	Incident Support Incident Manager
Status:	Current

Usually, when you resolve a case, the requester is notified that the case is resolved. The Support/Manager individual can then close the case. However, there might be occasions when you are asked to close the case. You can do so if you are the Assigned Individual for the case.

Note: If a help desk case has a Case Type of Problem, you must be a member of the Problem Management group to close the case.

FREQUENCY

- This use case is to be invoked every time an incident, question or request needs to be closed by a Support user.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- The Incident Status is “Resolved”.

POST CONDITIONS

- The Incident is closed and the person reporting the Incident (Requester) has verified that the Incident is closed.

ASSUMPTIONS

- The Incident has all required data elements/fields completed.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to close an Incident.
- The user has the correct permissions to close an Incident.

FORM NOTES

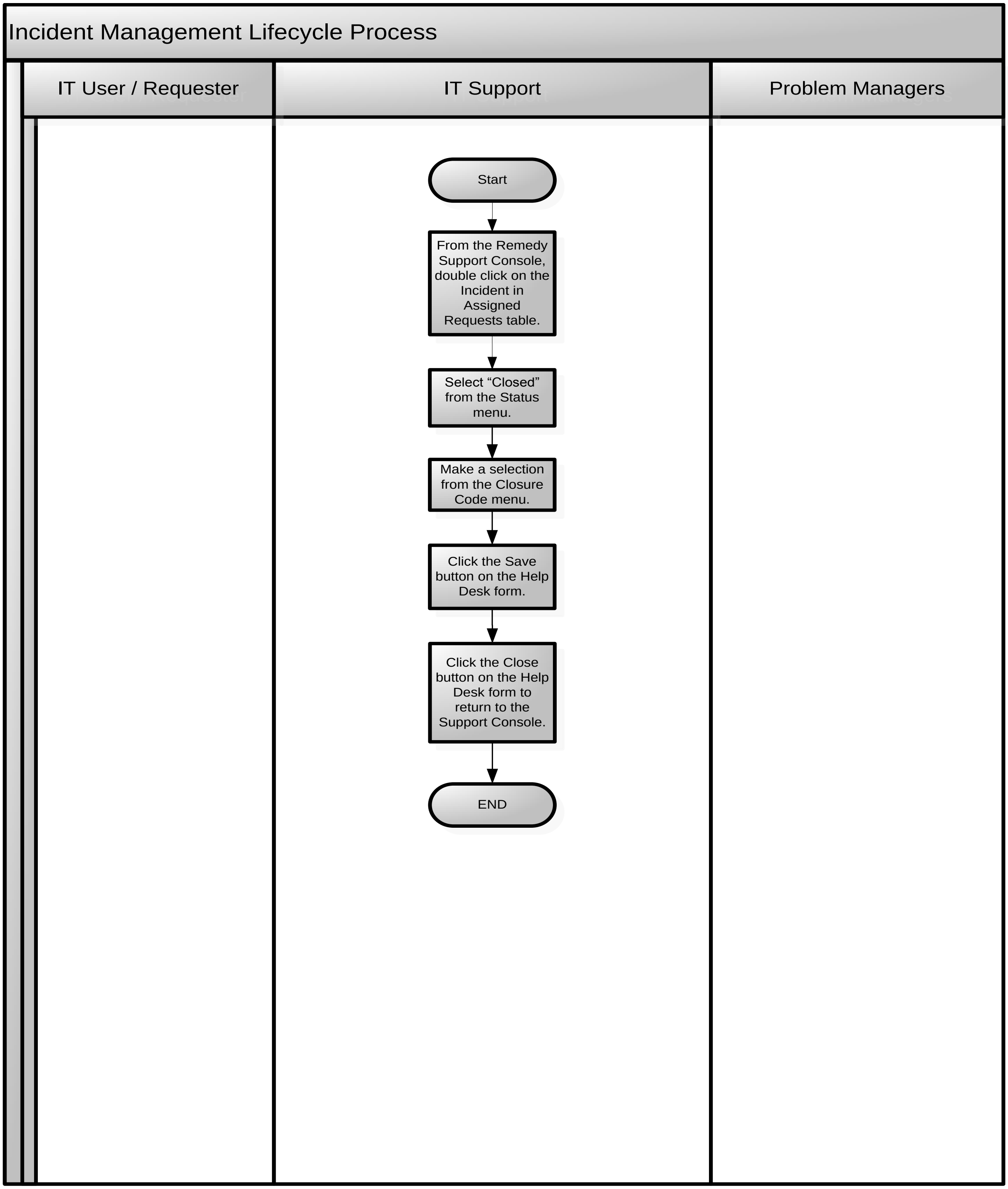
Help Desk Case Information form

Required fields**:** Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source, and Group.

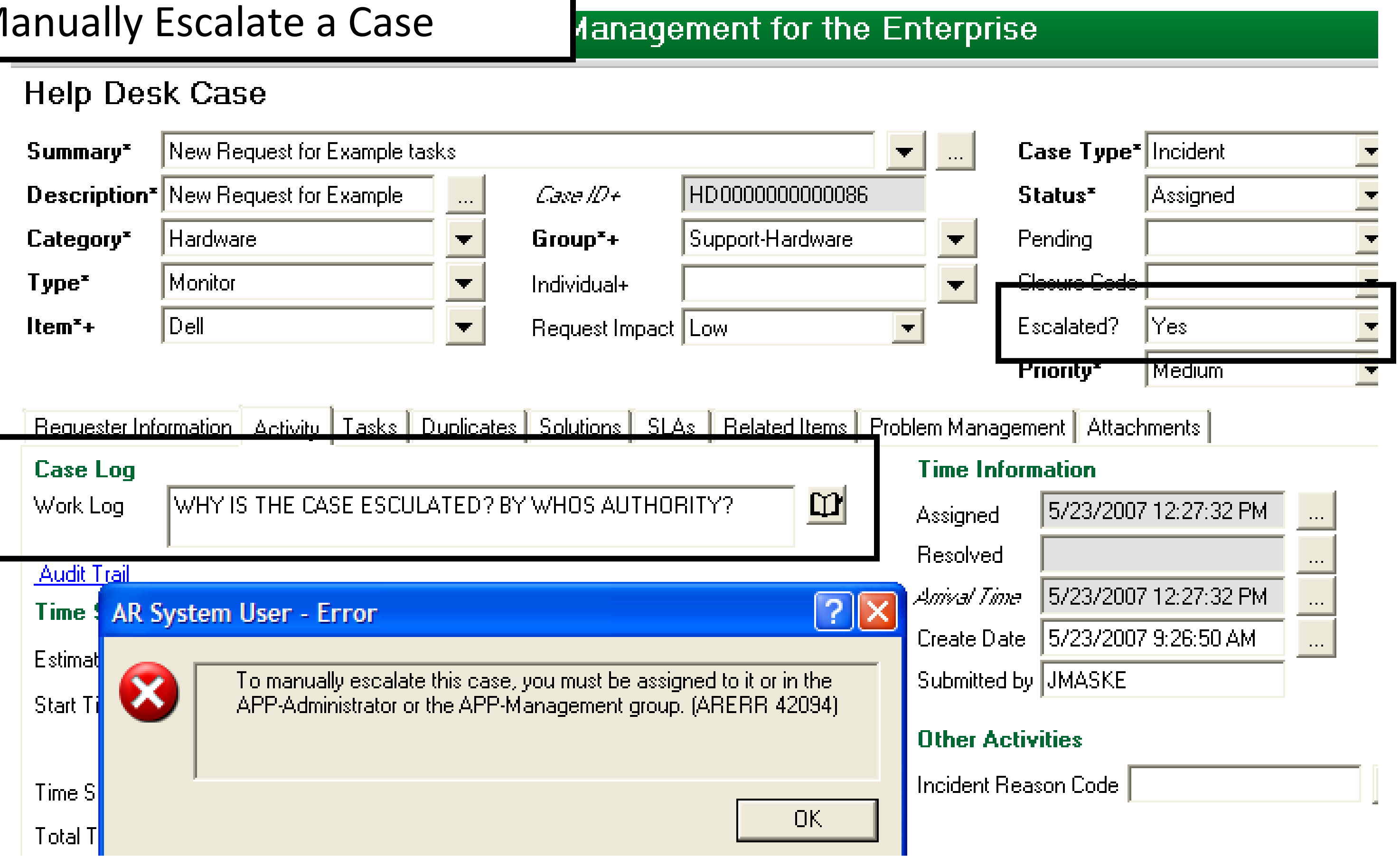
BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Select “Resolved” from the Status menu.
3) Make a selection from the Closure Code menu.
4) Click the Save button.
5) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



Manually Escalate a Case



MANUALLY ESCALATE AN INCIDENT

Use Case Name:	Escalate an Incident
Description:	The manual escalation of an Incident by Support staff.
Actors:	Incident Support
Status:	Current

When escalations are enabled, Help Desk cases and Change Requests are automatically escalated as soon as escalation criteria are met. Escalation criteria are set by the Help Desk administrator. For example, a case could be escalated if it is not given the status of "Work in Progress" within a certain time period.

When an escalation occurs, you are notified. Strategies for dealing with escalations differ among organizations, but can include the following actions:

- Reassigning the escalated request to another support staff member.
- Contacting the requester for more information about the request.

FREQUENCY

- This use case is to be invoked every time an Incident, question or request needs to be manually escalated by Support staff or physical contact is made to the individuals involved with the Incident to be escalated.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- The Incident does not possess a status of “Resolved” or “Closed”.

POST CONDITIONS

- The Incident is both escalated and manually escalated.

ASSUMPTIONS

- The Incident has all required data elements/fields completed.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to escalate an Incident.

- The user has the correct permissions to escalate an Incident. (User must be a member of the Group+ assigned to the Incident, a member of APP-Management group, or a member of the APP-Administrator group.)

Form Notes

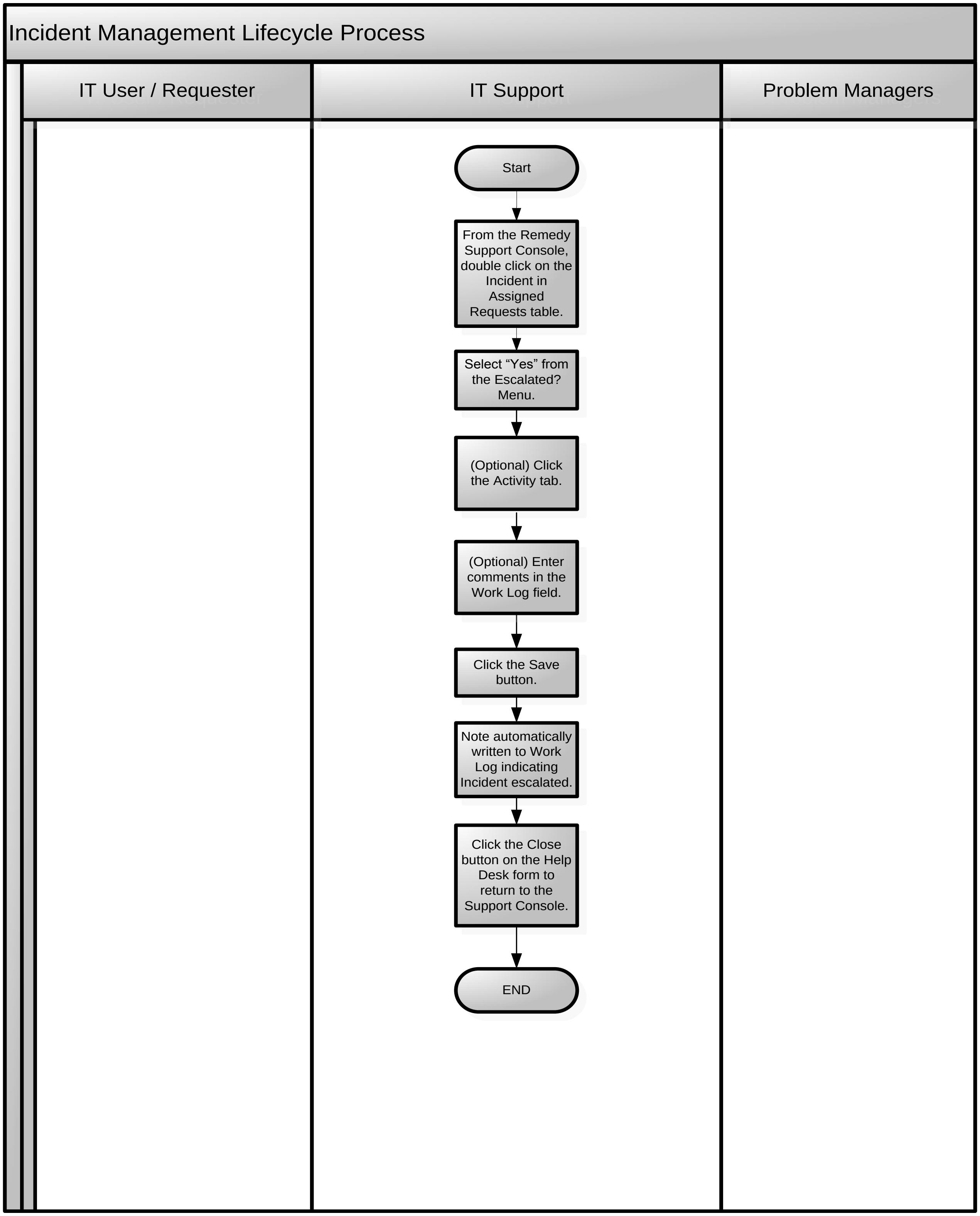
Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source and Group.

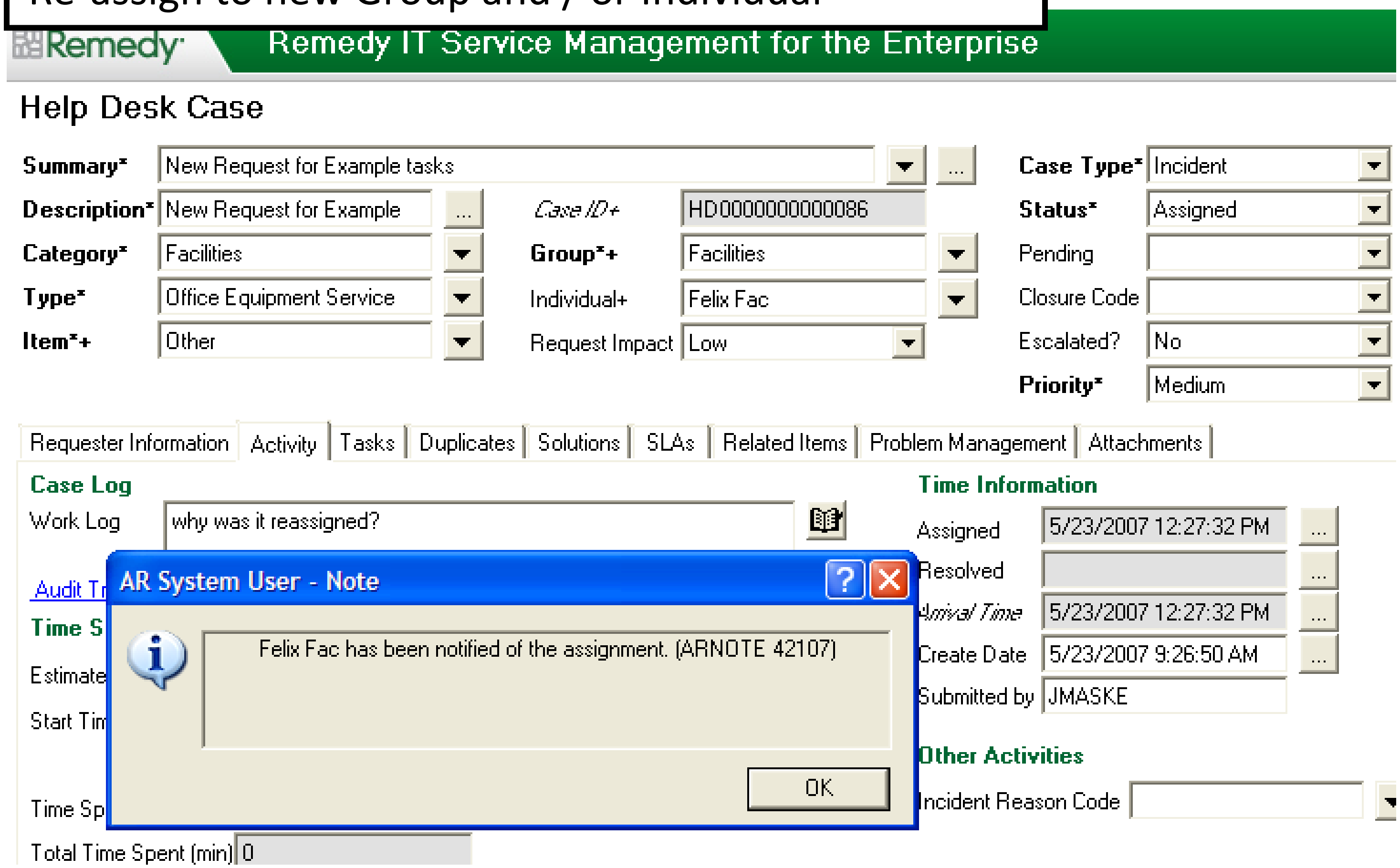
BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Select “Yes” from the Escalated? menu located in the top right portion of the form.
3) (Optional) Click the Activity tab.
4) (Optional) Type comments in the Work Log field indicating the reason for the escalation.
5) Click the Save button.
6) A note indicating the Incident has been escalated is automatically written to the Work Log field.
7) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



Re-assign to new Group and / or Individual



ACCEPT AN INCIDENT ASSIGNMENT OF A CASE

Use Case Name:	Reassignment of an Incident
Description:	The reassignment of an incident, question or request by Support staff.
Actors:	Incident Support Incident Manager
Status:	Current

FREQUENCY

This use case is to be invoked every time an incident, question or request needs to be manually reassigned to a different individual or group.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- The Incident does not possess a status of “Resolved” or “Closed”.

- The Incident is assigned to your group, you are the assignee's manager, you are in the APP-Management group, or you are the application administrator.

POST CONDITIONS

- The incident is reassigned to another group or individual.

ASSUMPTIONS

- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to modify/reassign an Incident.
- The user has the correct permissions to modify/reassign an Incident.
- The assigned support group or individual is unable to resolve the Incident.
- There is more than one support group available to process this combination of Category, Type, and Item.

FORM NOTES

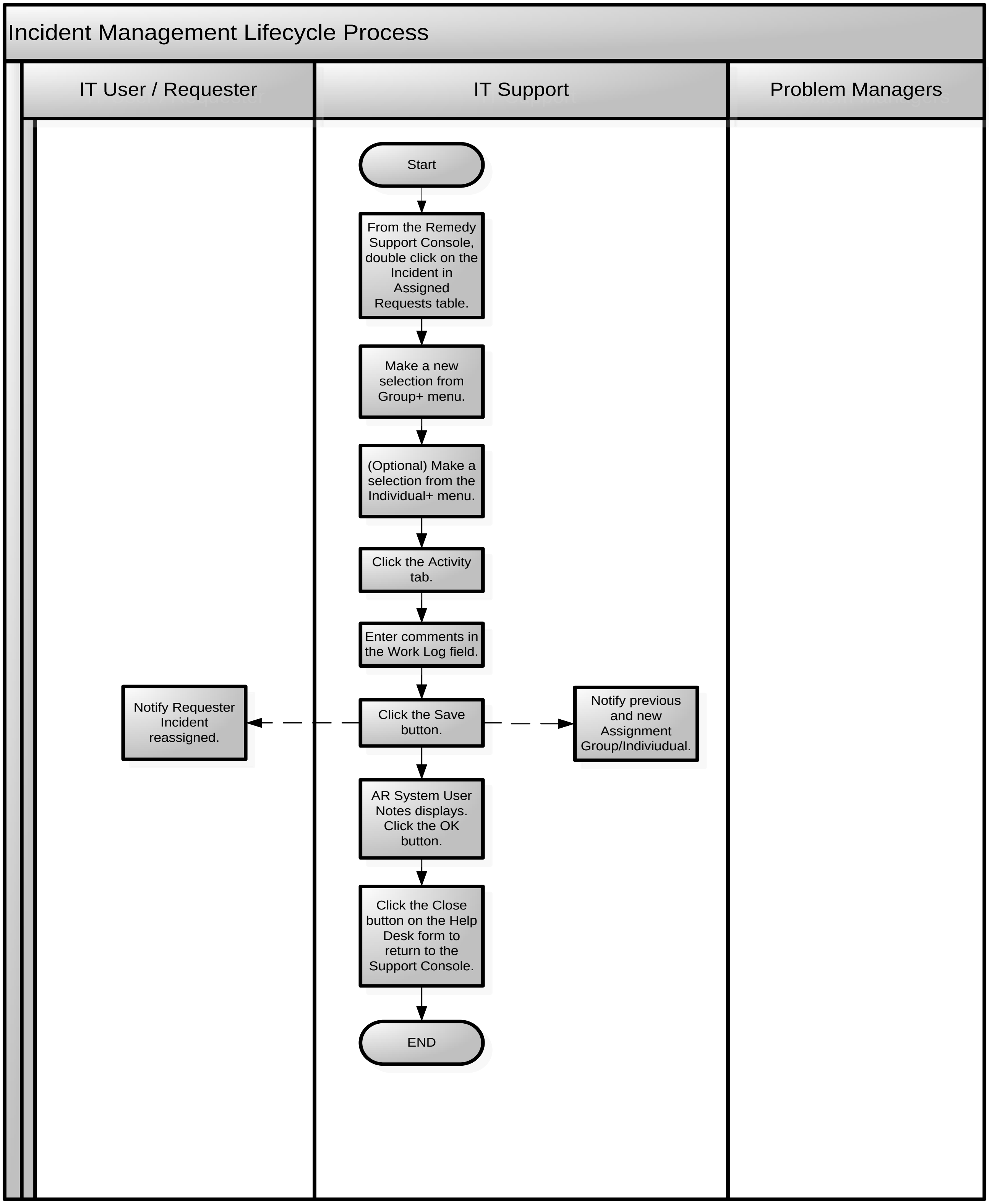
Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source and Group.

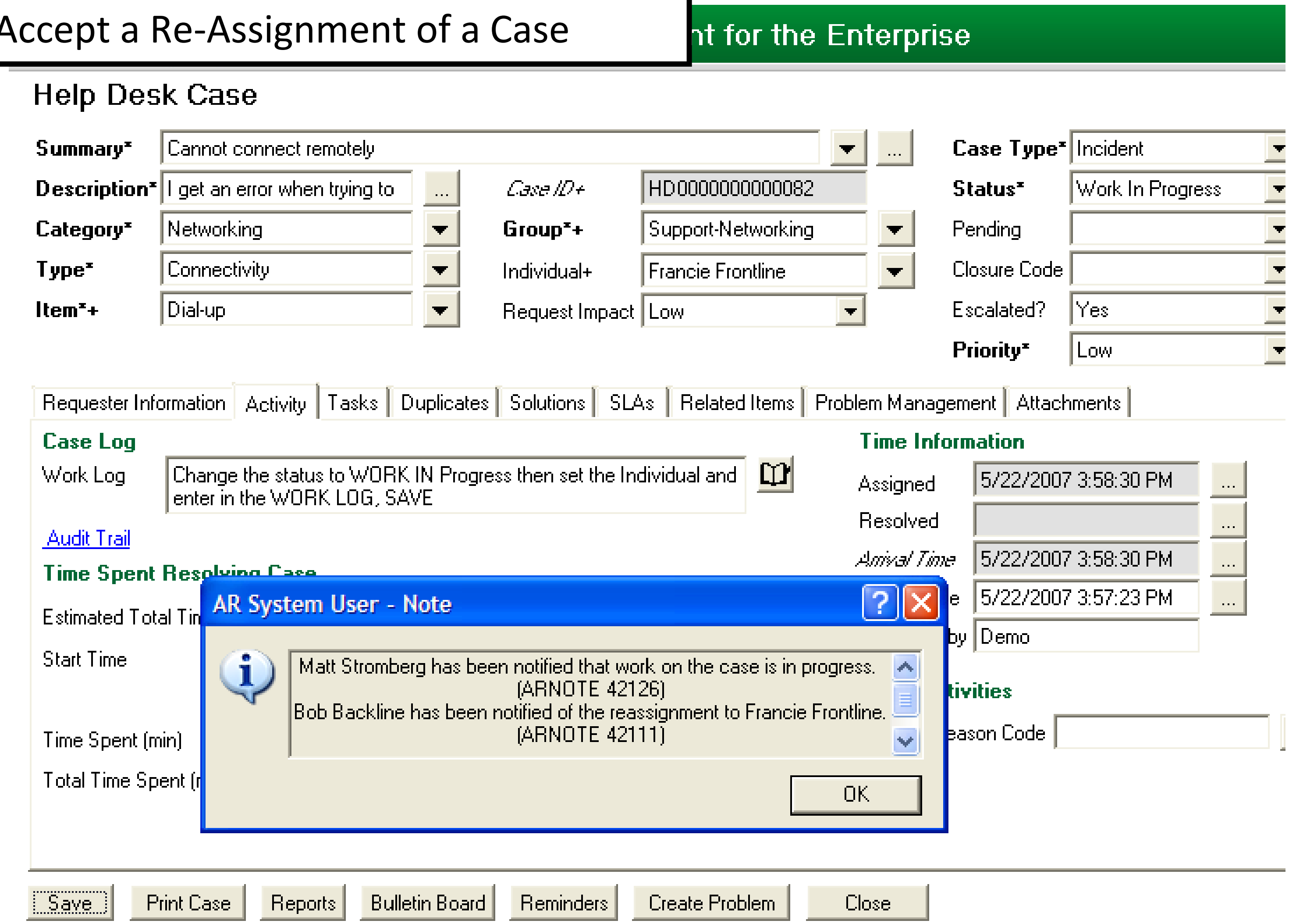
BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Select a new group from the Group*+ menu to assign the incident to.
3) (Optional) Select a new assignee from the Individual+ menu.
4) Click the Activity tab.
5) Enter a reason for the reassignment in the Work Log field.
6) Click the Save button.
7) An AR System User-Note box displays stating that both the previously-assigned and newly-assigned group(s)/individual(s) have been notified of the reassignment.
8) Click the OK button to close the AR System User-Note box.
9) A notification is sent to the previously-assigned group to alert them that the Incident was reassigned to another group.
10) A notification is sent to the newly-assigned group to alert them that an existing Incident was assigned to their group.
11) If the Incident was originally assigned to an individual, a notification is sent to the previously-assigned individual to alert them that the Incident was reassigned.
12) If the Incident was assigned to a new individual, a notification is sent to the newly-assigned individual to alert them that the Incident was re-assigned.
13) A notification is sent to the Incident Requester stating that the case has been reassigned.
14) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



Accept a Re-Assignment of a Case



ACCEPT AN INCIDENT ASSIGNMENT (OR PROBLEM ASSIGNMENT)

Use Case Name:	Accept an Incident Assignment
Description:	The acceptance of an Incident or Problem assignment by an individual.
Actors:	Incident Support Incident Manager Problem Support Problem Manager
Status:	Current

FREQUENCY

This use case is to be invoked every time an Incident, question, request or problem is assigned to a group and the individual needs to assume responsibility of the request.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- The Incident has been created and is assigned to a support group.

POST CONDITIONS

- The Incident has been assigned to an individual.

ASSUMPTIONS

- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to modify an incident.
- The user has the correct permissions to modify an incident.

FORM NOTES

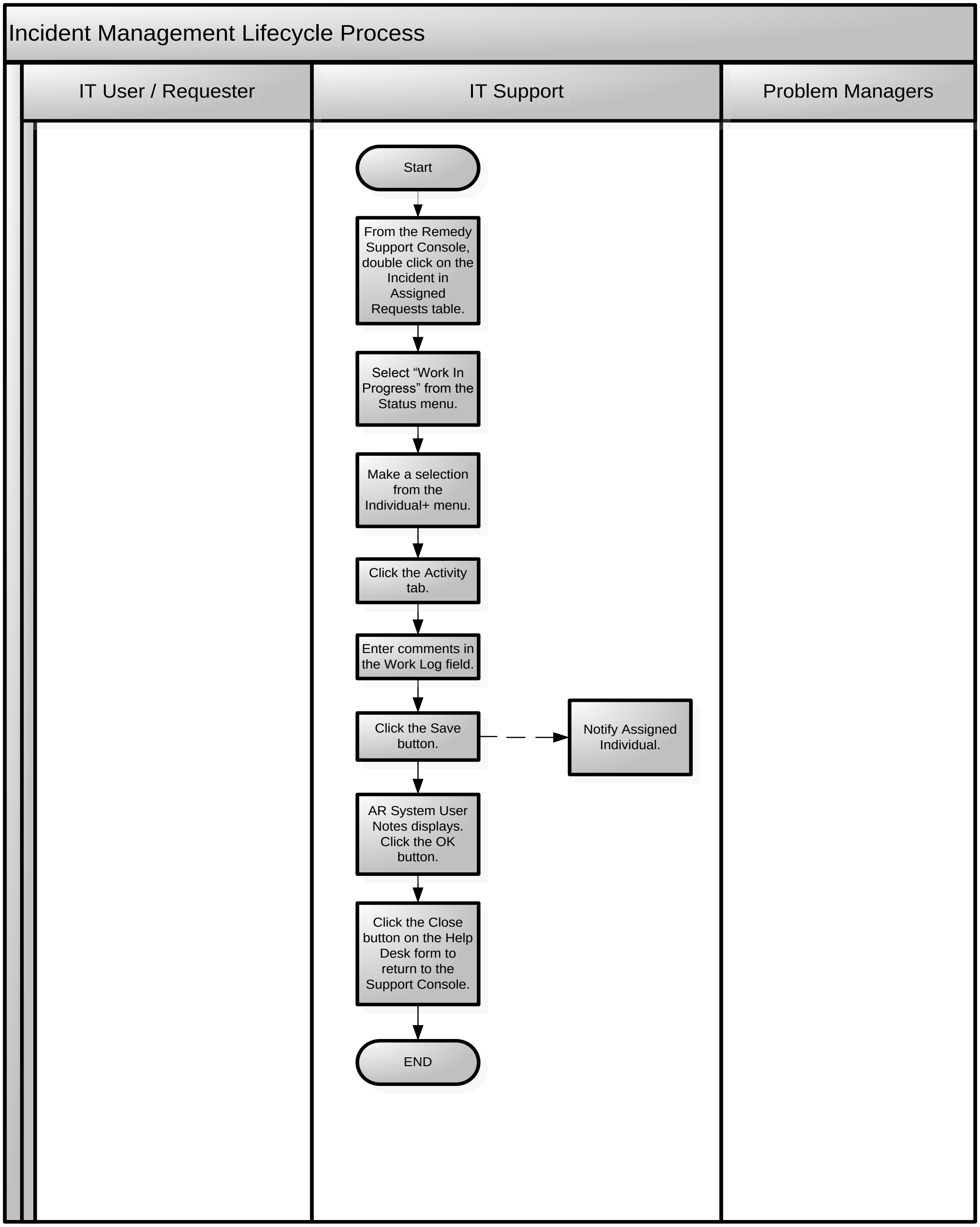
Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source and Group.

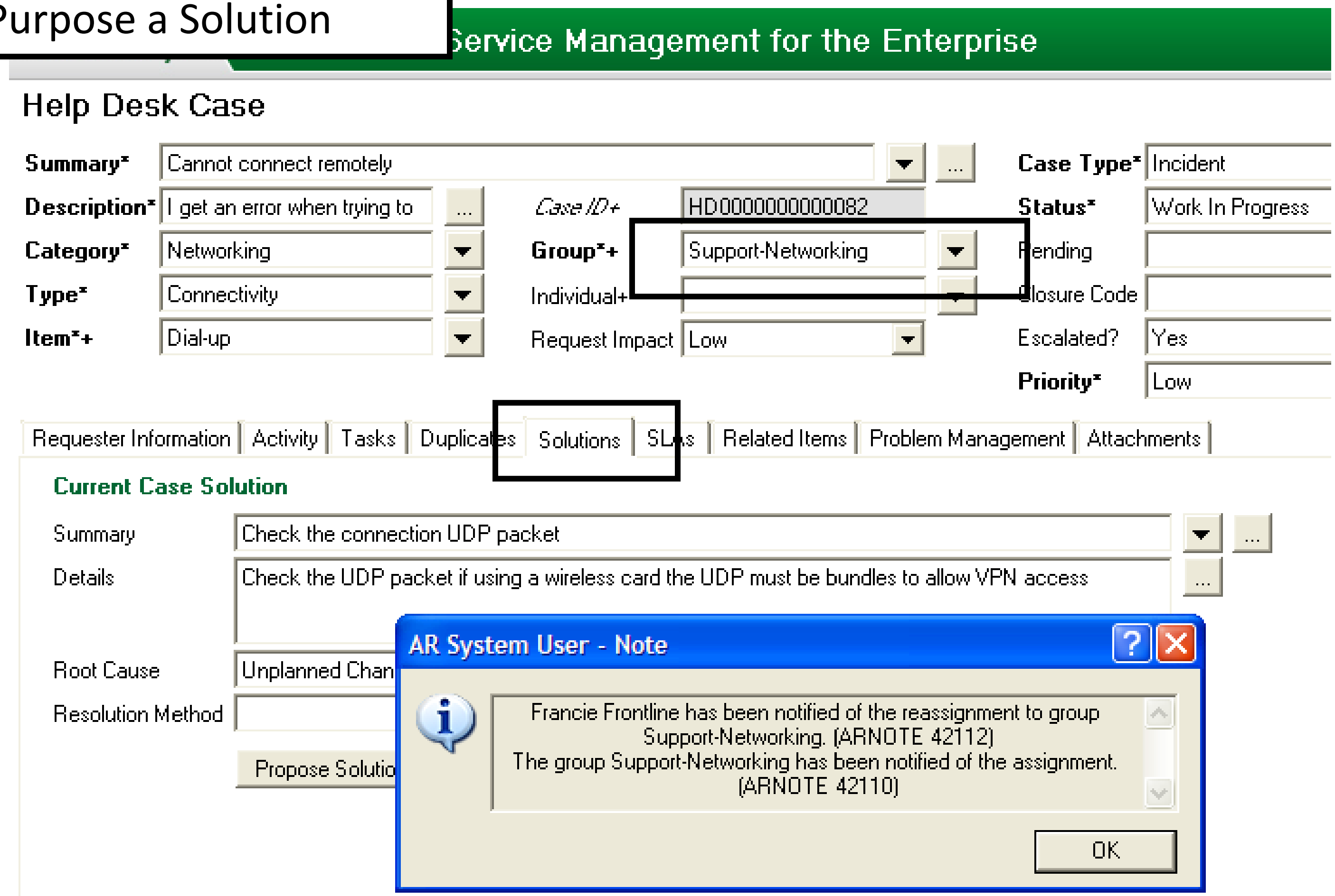
BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Select “Work In Progress” from the Status menu.
3) Make a selection from the Individual+ menu.
4) Click the Activity tab.
5) Enter comments in the Work Log field.
6) Click on the Save button.
7) An AR System User-Note box displays stating that the Assignee has been notified of the Incident assignment.
8) Click the OK button to close the AR System User-Note box.
9) A notification is sent to the Assignee to alert him/her that an existing Incident was assigned to him/her.
10) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



Purpose a Solution



PROPOSE A SOLUTION (NOT AT THE PRESENT TIME)

Use Case Name:	Propose Solution
Description:	A solution to an incident, request, question or problem has been formulated by a member of the IT support group.
Actors:	Incident Support Incident Manager Problem Support Problem Manager
Status:	Current

FREQUENCY

This use case is to be invoked every time a new potential solution to an incident, question, request or problem is proposed.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- The Incident has been created and is assigned to a support group.

POST CONDITIONS

- A Solution record has been submitted and is pending approval.

ASSUMPTIONS

- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to create a solution.
- The user has the correct permissions to create a solution.

FORM NOTES

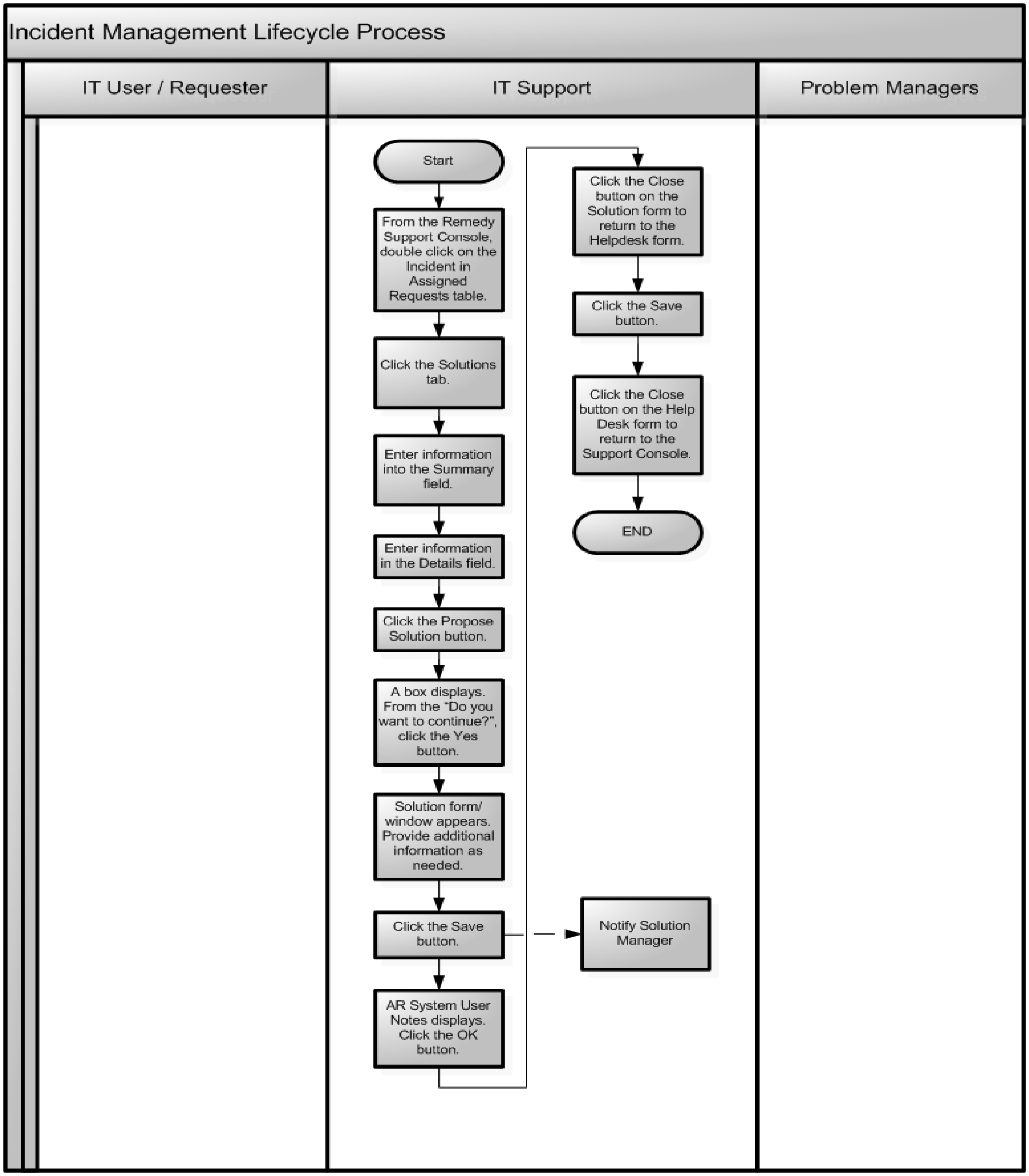
Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source and Group.

BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Click the Solutions tab.
3) In the Summary field, enter a summary of the solution.
4) Enter detailed information regarding the Solution in the Details field.
5) Click the Propose Solution button.
6) A box will display. In response to the "Do you want to continue?" prompt, click the Yes button to send the proposed solution to the Solutions Management group.
7) The Solution form appears in submit mode. Information from the Incident will automatically populate many of the fields in the Solution form.
8) Provide additional information for the Solution as needed.
9) Click the Save button.
10) An AR System User-Note box displays stating that the Solutions Management group has been notified of the proposed solution.
11) Click the OK button to close the AR System User-Note box.
12) The solution is saved with a status of "Proposed", and the solution manager is notified.
13) Click the Close button to return to the Help Desk form.
14) Click the Save button.
15) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



Approve a Solution

Use Case Name:	Approve a Solution
Description:	The approval of a proposed solution by the Solutions Management group.
Actors:	Solutions Management
Status:	Current

Frequency

This use case is to be invoked every time a new proposed solution needs to be approved.

Preconditions

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Console form in Remedy.
- A solution has been submitted with a status of “Proposed”.

Post conditions

- The solution is approved and made available for others to use.

ASSUMPTIONS

- The user has the correct licensing to approve a solution.
- The user has the correct permissions to approve a solution.

FORM NOTES

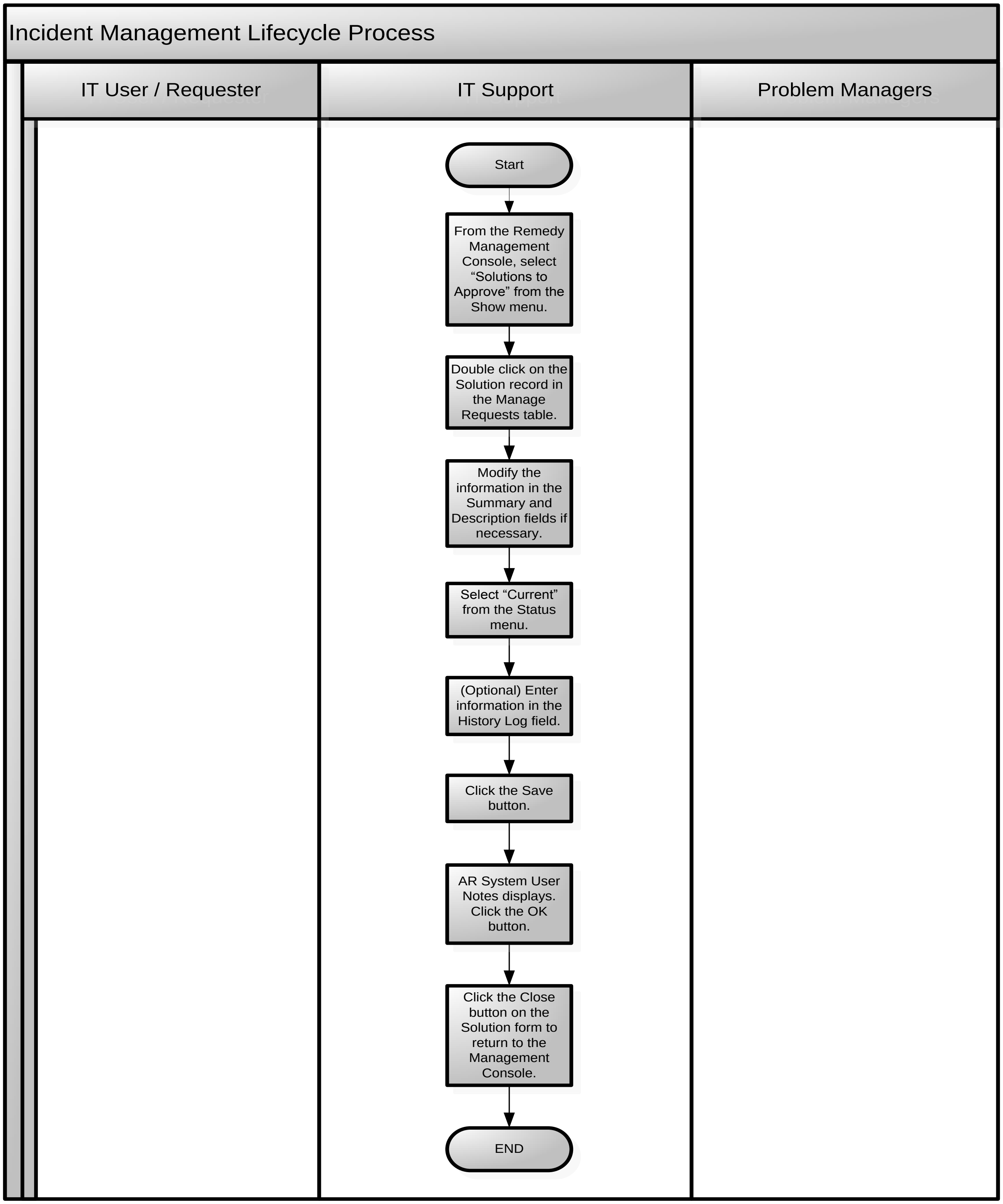
Help Desk Case Information form

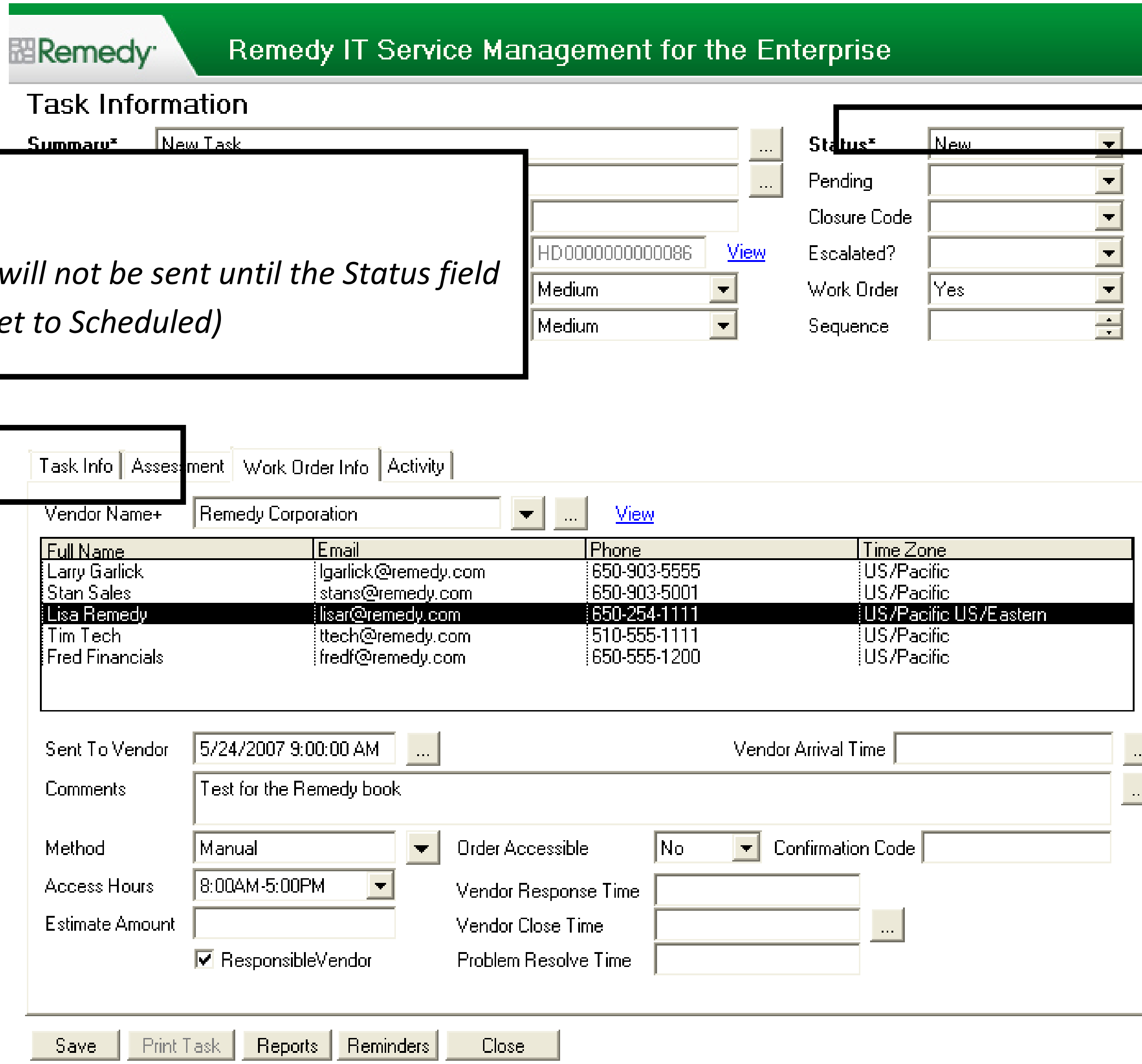
Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source and Group.

BASIC COURSE OF ACTION

1) From the Remedy Management Console, select “Solutions to Approve” from the Show menu.
2) Double click on the Solution record in the Manage Requests table. This will open the Solution form window with the solution information fields populated.
3) Modify the information in the Summary and Description fields if necessary.
4) Select “Current” from the Status menu.
5) (Optional) Enter information in the History Log that pertains to the approval of this solution. For example, changes you made to the solution before approving it.
6) Click the Save button.
7) An AR System User-Note box displays stating that the Solution has been modified.
8) Click the OK button to close the AR System User-Note box.
9) To return to the Management Console screen, click on the Close button of the Solution form.

USE CASE PROCESS DIAGRAM





Ad-Hoc Tasks

Reminder (notification will not be sent until the Status field is set to Scheduled)

ADDING AD HOC TASKS TO AN INCIDENT (OR PROBLEM)

Use Case Name:	Adding Ad Hoc Tasks to an Incident (or Problem)
Description:	Add ad hoc tasks to an Incident or Problem.
Actors:	Incident Support Incident Manager Problem Support Problem Manager
Status:	Current

Note: To add a Work order for a Vendor ticket you must first create a Task.

Adding and Assigning Tasks down to the Technician level (Status=Scheduled)

Description: Activity to add pre-defined or new tasks, sequence the order in which the tasks are to be completed (concurrently or dependent) and assign a specific Technician to complete each task. Change status of request to Scheduled when all tasks are added, assigned to a technician, and sequenced properly.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
5a	Add in pre-defined or new Tasks to the service request- and if necessary, sequence the order in which tasks may be completed	PLANNING	Shared Service team	• Identifies all work related tasks necessary to complete the service request details • Determines order in which work tasks must be sequenced (concurrent work or dependent upon a task) • Identifies the technician responsible for completing each	• Shared Service manager (or appointed delegate) is responsible to add in tasks for any service request with work tasks that are to be completed by more than one technician within their specific team, or work tasks that may be dependent upon additional / other shared service teams (Required) • Shared Service manager (or appointed delegate) is

				specific work task • Includes Tasks and related Attachments to accommodate up to and no more than 10 Asset moves per one service request • Note: It is a recommended best practice to group by location (RSD) or by deployment date (planned start / end) for service requests that are used for up to 10 Asset related moves within one request	responsible for selecting from available pre-defined task lists or by manually adding in any new tasks specific to the work necessary to complete the service request • Shared Service manager (or appointed delegate) is responsible for making a determination of how work tasks are to be ordered / sequenced. Concurrent work tasks may share the same sequence number; dependent work tasks must be numbered higher than tasks that must be completed first. Sequencing tasks is only necessary when applicable.

					• Shared Service Team is responsible for allowing up to – and no more than 10 (maximum) Asset moves to be assigned and tracked within one service request, and to include specific details on all Assets in the Attachment section (Required)
5b	Assign a specific technician to each Task that has been added into the service request	PLANNING	Shared Service team	• Identifies a technician to carry out the completion of a work task associated to the service request • Updates the work-log with additional notes, instructions for the technician to follow • Ensures a final task at	• Shared Service manager (or appointed delegate) is responsible for assigning task level work to a specific technician and provide any additional data in the attachments or work-log • Shared Service manager (or appointed delegate) is responsible to add in a pre-

				the end of every service request is added to review and verify completion of the request with the customer	defined final task to ensure a QA follow up and review of the completion and quality of work with the customer (either the Requested By or Task Coordinator) in every single request – (Required)
5c	Change the status of the service request to Scheduled to initiate the start of work task activities for assigned technicians	SCHEDULED	Shared Service team	• Updates the work-log with a new entry and saves the service request into Scheduled status	• Shared Service manager (or appointed delegate) is responsible for changing the status of any service request with assigned tasks into a status of Scheduled when the request is ready to begin work tasks. • Note: Auto-notification to the technician of assigned tasks will not commence until the request is moved into a

					Scheduled status.

Completing Task Work Assignments (Status=Work In Progress)

Description: Task assignments are being worked on by the technician and the service request status will remain in Work In Progress until the last task is completed. Service requests with no Tasks associated may skip the Scheduled status and move directly to Work In Progress.

Note: Telecom Work Order Tasks: If the Requester calls back within three days acknowledging that the incident is Resolved, then Update the Work Log and Set Status to Closed and Set Closure Code.

If They call back after the Task is Closed with a dispute: Set the Help Desk Case to Satus=WIP, Create a New Task /Work Order for responsible vendor, Enter original date and time from Sent to Vendor/Vendor Arrival Time, Repeat steps of update until Resolved.

Step	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
6a	Technician will receive a notification message from Remedy to begin work on their assigned Task(s) and will move Task status into Work In Progress while attending to the completion of	WORK IN PROGRESS	Shared Service Technician	• Reviews the Remedy console for new / assigned Task work, and / or reviews incoming Email notification to check Remedy console for new / assigned Task	• Shared Service Technician is responsible for pro-actively checking in the Remedy system any new Tasks that have been assigned; or may also rely on Email notification from Remedy of new Tasks that have been assigned.

	work tasks. Note: The overall request status of the service request will automatically move to Work In Progress status when the first Task scheduled is changed to Work In Progress.			work • Reviews service request details in the Remedy fields and within the ESR Form Attachment • Identifies all work tasks to be completed, updates work-log and changes status of service request to Work In Progress • Consults and works with agency Task Coordinator to verify or confirm details of the service request	Technician must always review all data within the Remedy service request prior to working on a new task. • Shared Service Technician is responsible to perform a detailed review of all service request data in the Remedy ticket and should not solely rely on an Email notification to begin task work activities. Work-log entries are required to complete tasks before the service request can be saved. • Shared Service Technician is responsible to change the status of the service request to Work In Progress before the work activity is to be

					performed and should not delay this activity until after the work activity is completed. • Shared Service Technician is responsible for consulting with the Task Coordinator in requesting additional details related to the service request (when applicable)
6b	Technician completes a specific task (or multiple concurrent tasks) and changes status of Task from Work In Progress to Closed. If multiple tasks are sequenced, the first task completed will trigger the next sequenced	WORK IN PROGRESS	Shared Service Technician	• Updates the work-log and changes Task status to Closed when each of the triggered sequence of work tasks are completed	• Shared Service Technician is responsible for assigned Task work is accurately performed and completed in a timely manner • Shared Service Technician is responsible for updating the work-log and ensuring the Task

	task in line to begin.				status is Closed upon completion of work activity, to allow a smooth transition of successor Tasks
6c	Shared Service manager may assign a request to be completed by one technician based on a single work activity and no related Tasks to be added or Scheduled. Technician can change the request status to Work In Progress to perform Task-less work activities.	WORK IN PROGRESS	Shared Service Manager	• Consults with a single technician to perform all work activities in the service request without adding and assigning Tasks • Changes status of the service request from Planning into Work In Progress and may bypass the Scheduled status (when applicable)	• Shared Service manager (or appointed delegate) is responsible to update the work-log and provide specific work activity information for a single Technician to complete. • Shared Service manager (or appointed delegate) is responsible for consulting directly with the Technician before changing the status of the request to Work In Progress, due to lack of auto notification and triggering

					status.

FREQUENCY

This use case is to be invoked every time ad hoc tasks need to be created for an Incident or Problem.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.

POST CONDITIONS

- Task records have been added to the Incident.

ASSUMPTIONS

- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to update an Incident.
- The user has the correct permissions to update an Incident.

FORM NOTES

Task Information form

Required fields: Summary, Category, Type, Item, Status, Priority and Scope.

BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Click the Tasks tab.
3) Click the Create New Tasks button. The Task Information form appears.
4) Enter the following information in these required fields on the top portion of the form:

   Note: Out-of-the-box workflow will automatically populate many of the fields below with the information from the Incident.

   Summary* - Enter a brief description of the Task. (Use Pre-Defined if available)

   Description – Enter Complete and Concise instructions to complete the task

   Category* - Choose a category for the Task from the menu.

   Type* - Choose a type for the Task from the menu.

   Item* - Choose an item for the Task from the menu.

   Priority* - Specify the priority of the Task by selecting from the menu.

   Status* - By default, the Status is set to "New".

5) Click the Task Info tab.

   Note: Multiple Ad-hoc Tasks may be added as needed.

6) Make a selection from the Scope* menu. (Telecom is local) (Default is Local)

   Note: If you select "Global", the Region, Site, Department, and Office fields are cleared and disabled.

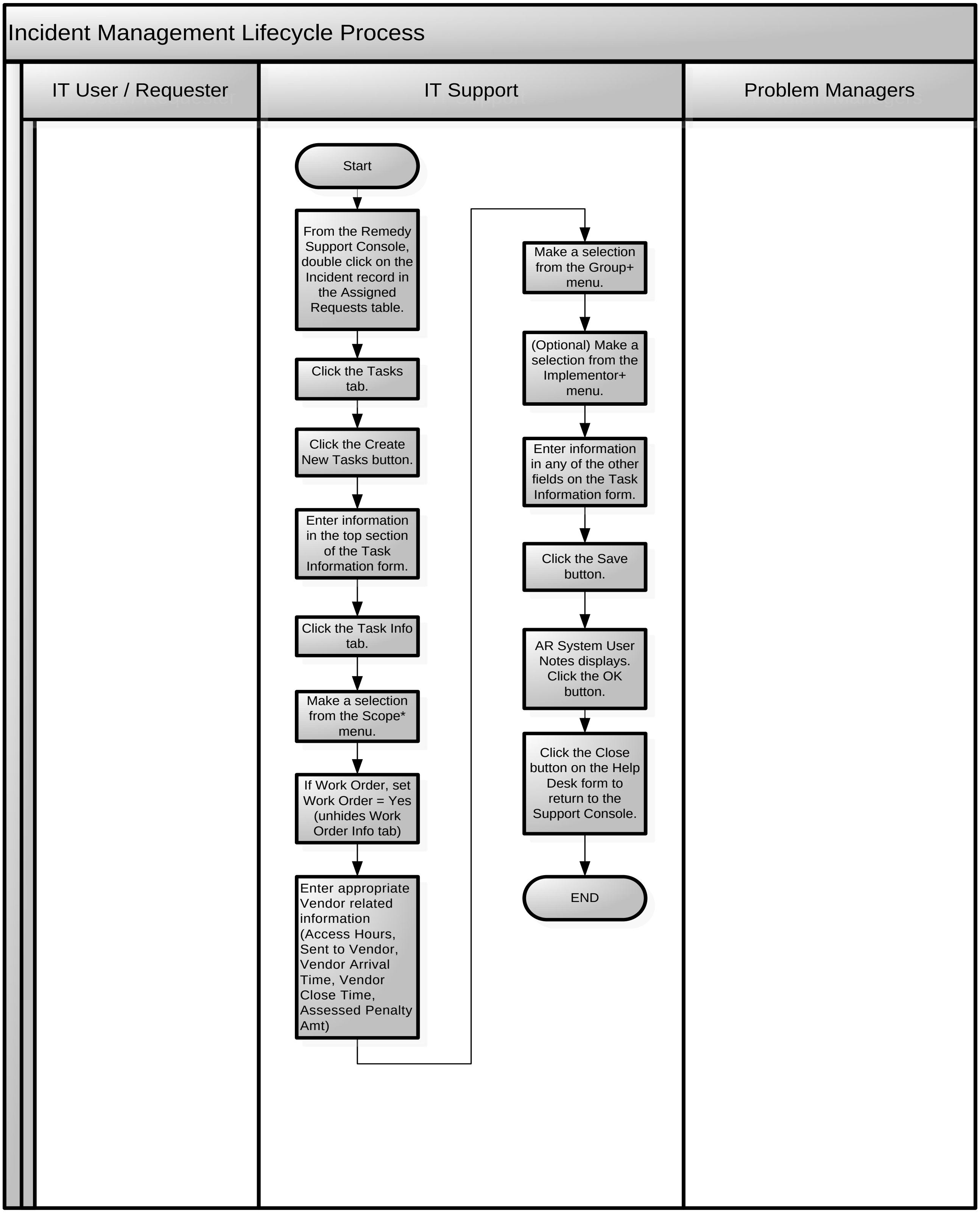
7) Make a selection from the Group+ menu.

   Note: If there are no groups in the menu to select from, try making modifications to the Category, Type*, and Item* fields above.*

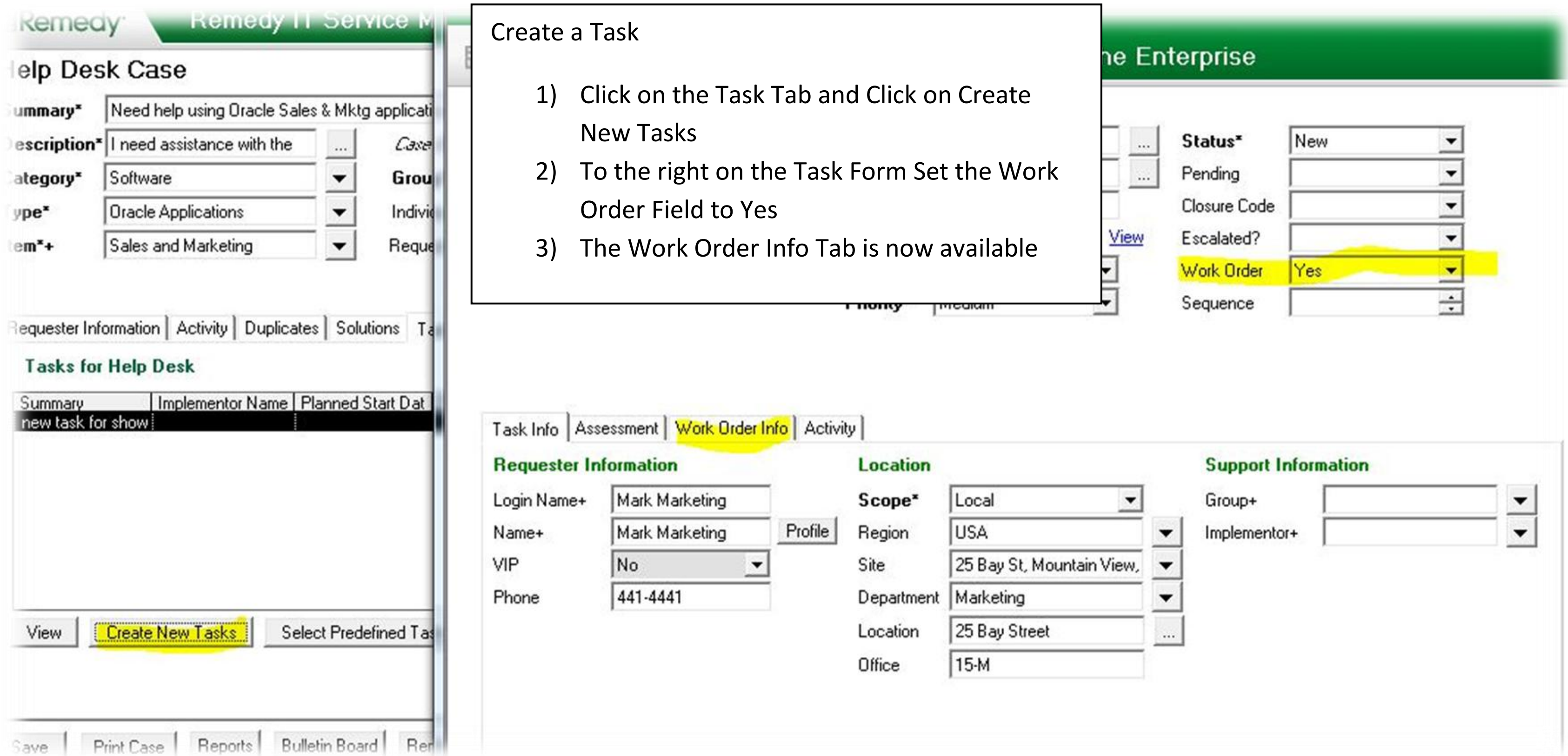
8) (Optional) Individual+ - **(Telecom does not assign to an Individual, but to a Group, it is the Supervisor that would make a decision on an Individual assignment)** Make a selection from the Individual+ menu.

9) Enter information in any of the other fields on the Task Information form if applicable.
10) Click the Save button.
11) An AR System User-Note box displays stating that a new task has been created and that the Group/Individual assigned to the task will not be notified until the status of the task is changed to "**Scheduled**".
12) If this is a Work Order (**for example, a Vendor task**), set Work Order = Yes. This un-hides the Work Order Info tab.
13) Enter appropriate Vendor related information (**Access Hours, Sent to Vendor, Vendor Arrival Time, Vendor Close Time, Assessed Penalty Amt**).
14) Set the Status* to Work in Progress, Update the Conformation Code and Vendor Arrival Time. Update the Work Log filed in the Assessment Field.
15) Click the OK button to close the AR System User-Note box. This will automatically close the Task Information form and return to the Help Desk form. The newly-created task appears in the Tasks for Help Desk table.
16) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM

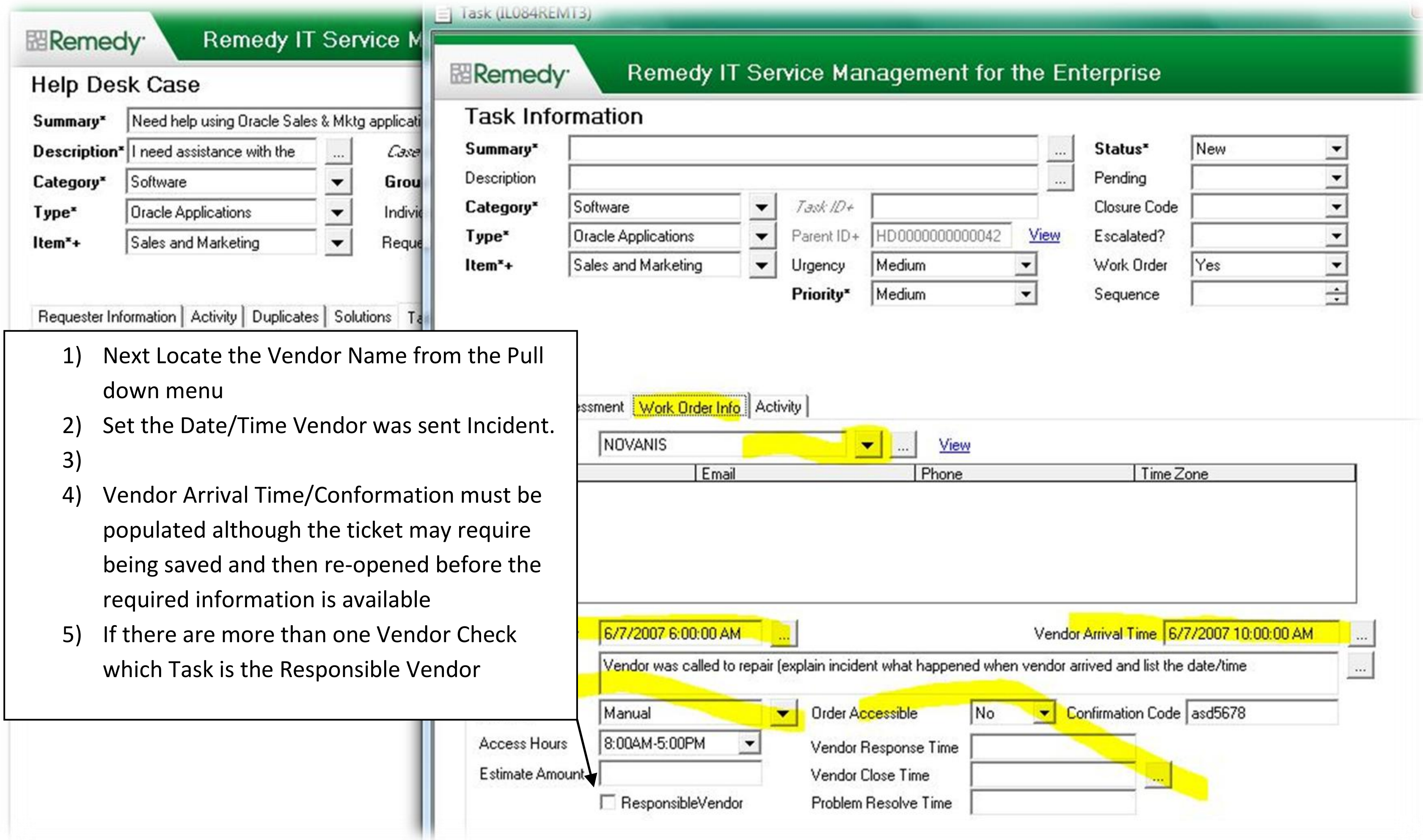


STEPS TO ADD A WORK-ORDER TASK

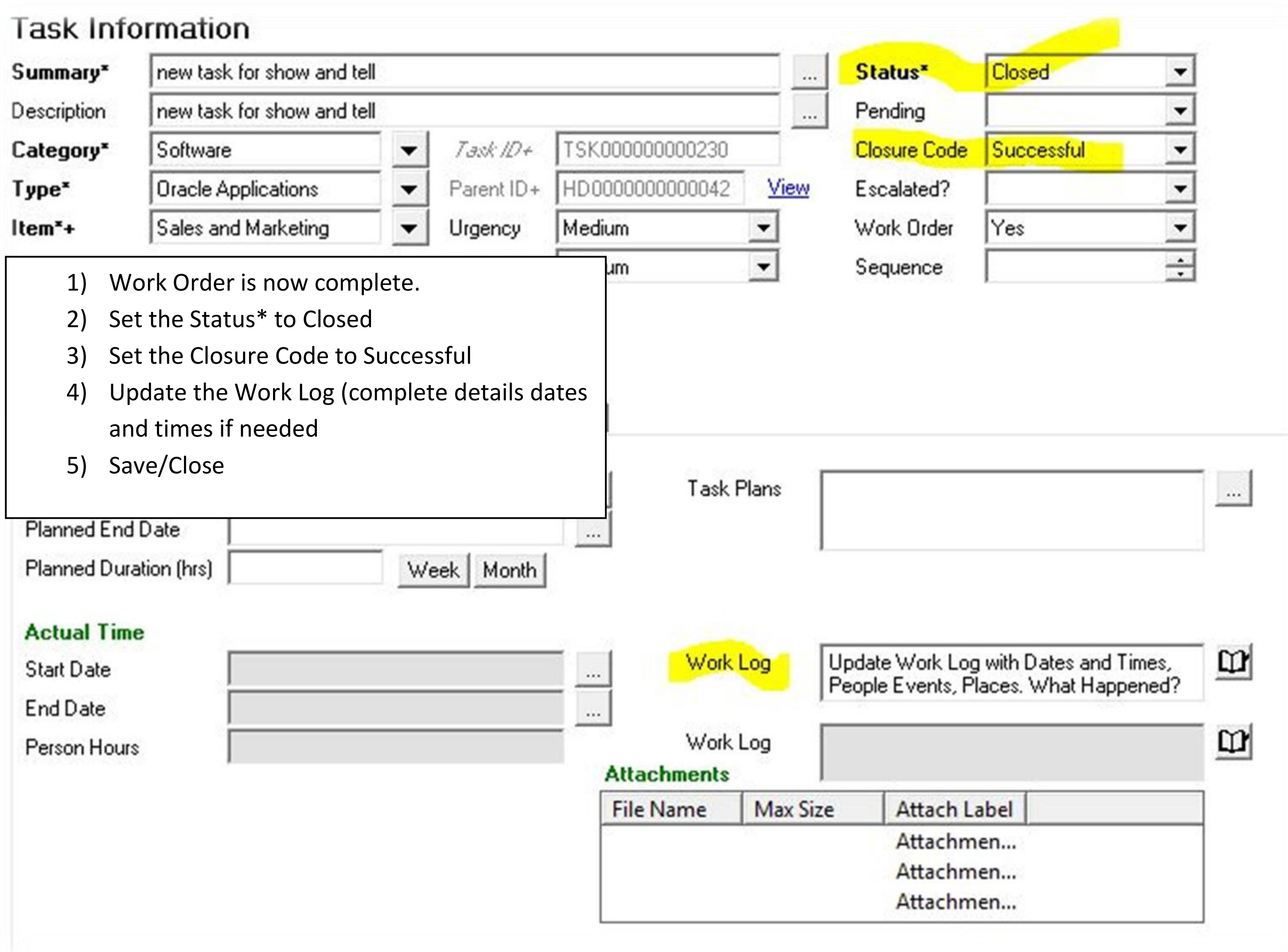


Create a Task

1) Click on the Task Tab and Click on Create New Tasks
2) To the right on the Task Form Set the Work Order Field to Yes
3) The Work Order Info Tab is now available



1) Next Locate the Vendor Name from the Pull down menu
2) Set the Date/Time Vendor was sent Incident.
3)
4) Vendor Arrival Time/Conformation must be populated although the ticket may require being saved and then re-opened before the required information is available
5) If there are more than one Vendor Check which Task is the Responsible Vendor



1) Work Order is now complete.
2) Set the Status* to Closed
3) Set the Closure Code to Successful
4) Update the Work Log (complete details dates and times if needed
5) Save/Close

ADDING PREDEFINED TASKS TO AN INCIDENT (OR PROBLEM)

Use Case Name:	Adding Predefined Tasks to an Incident (or Problem)
Description:	Add predefined tasks to an Incident or Problem.
Actors:	Incident Support Incident Manager Problem Support Problem Manager
Status:	Current

FREQUENCY

This use case is to be invoked every time predefined tasks need to be created for an Incident or Problem.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.

- The user is at the IT Service Management Support Console form in Remedy.
- A Predefined Task Template has been created with the same Category menu value as the Incident Category menu value.

POST CONDITIONS

- Predefined Task records have been added to the Incident or Problem.

ASSUMPTIONS

- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to update an Incident.
- The user has the correct permissions to update an Incident.
- The Incident Status is not “Resolved” or “Closed”.

FORM NOTES

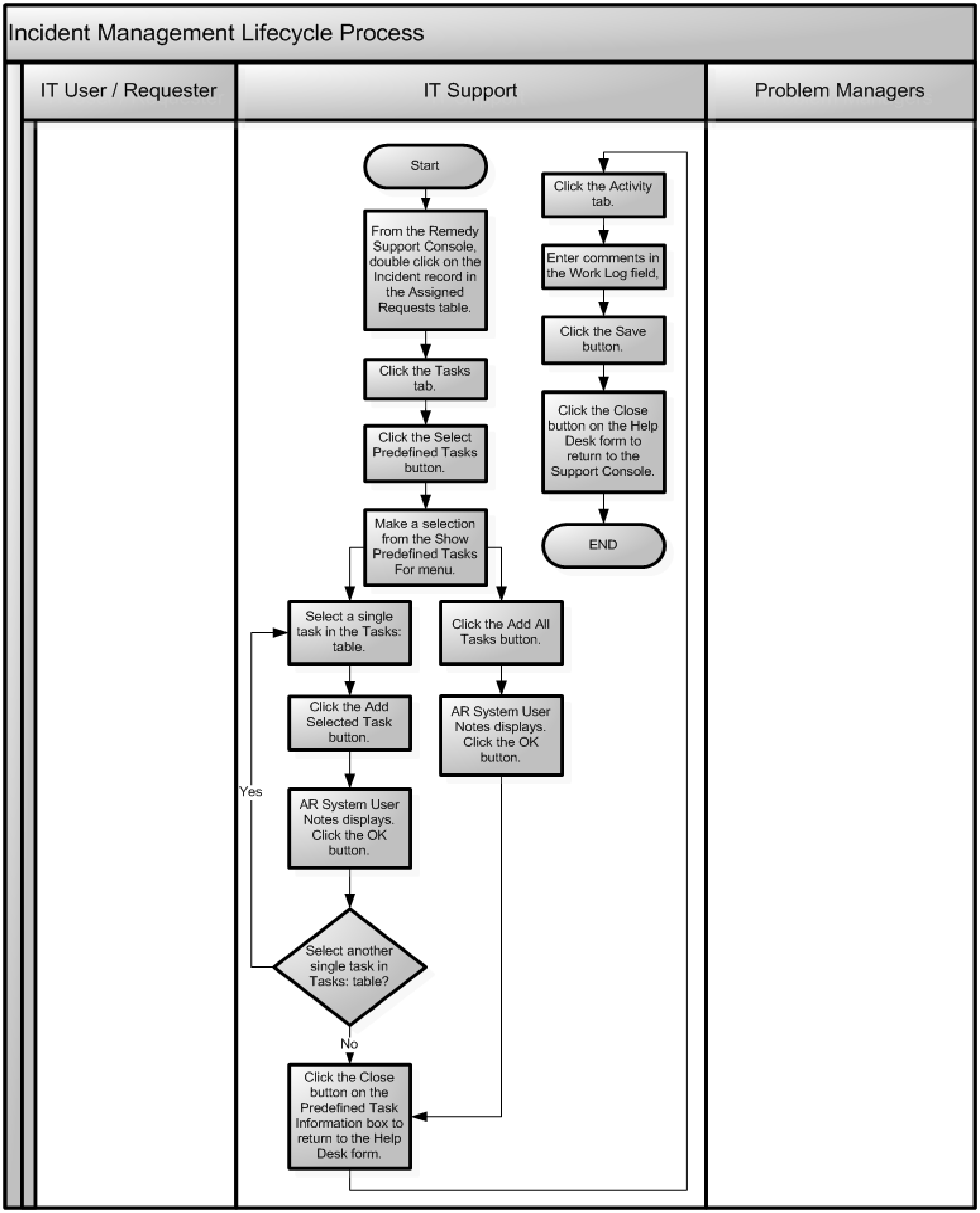
Task Information form

Required fields: Summary, Category, Type, Item, Status, Priority and Scope.

BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Click the Tasks tab.
3) Click the Select Predefined Tasks button. A Predefined Task Information box will appear.
4) Make a selection from the Show Predefined Tasks For menu, which displays certain processes/services that contain predefined tasks. The predefined tasks will appear in the table below.
5) Highlight one or more tasks in the Tasks table (Proceed to Step 6) OR click the Add All Tasks button (Proceed to Step 7).
6) Click the Add Selected Task button.
7) An AR System User-Note box displays stating that task(s) have been added.
8) Click the OK button to close the AR System User-Note box.
9) In necessary, repeat steps 5 through 8 to add additional tasks.
10) Click the Close button to close the Predefined Task Information box and return to the Help Desk form. The predefined task(s) appear in the Tasks For Help Desk table.
11) Click the Activity tab.
12) Enter comments in the Work Log field.
13) Click the Save button.
14) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



WORK WITH TASKS

Use Case Name:	Work with Tasks
Description:	View and modify tasks.
Actors:	Incident Support Support Manager
Status:	Current

FREQUENCY

This use case is to be invoked every time a Task needs to be reviewed and/or updated.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.
- The user is at the IT Service Management Support Console form in Remedy.
- A Task has been created and assigned to a Support group.

POST CONDITIONS

- Task records have been updated.

ASSUMPTIONS

- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to update a task.
- The user has the correct permissions to update a task.
- The task has a status of “New”.

FORM NOTES

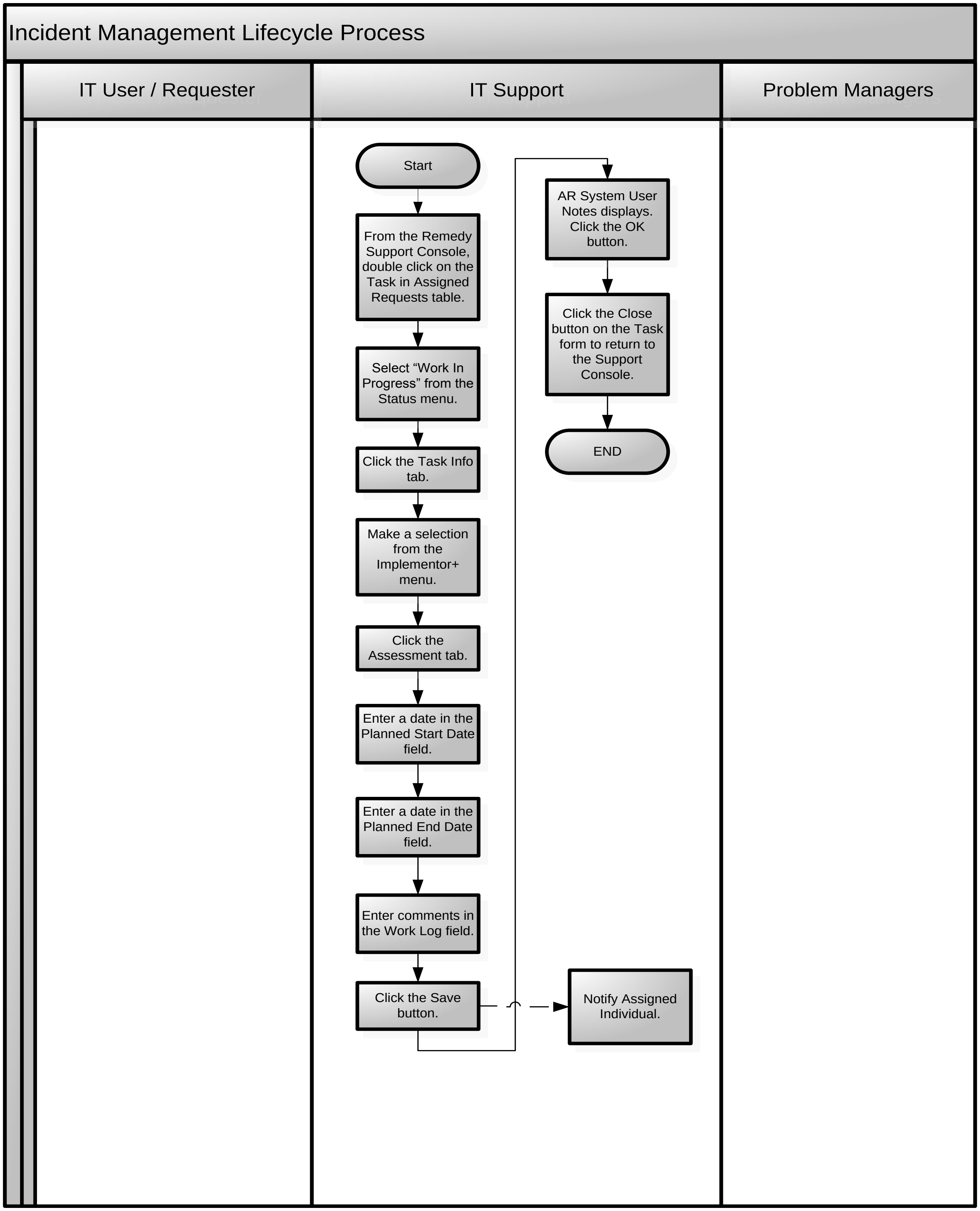
Task Information form

Required fields: Summary, Category, Type, Item, Status, Priority and Scope.

BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Task record in the Assigned Requests table. This will open the Task form window with the Task information populated.
2) Select “Work In Progress” from the Status* menu.
3) Click the Task Info tab.
4) Select an individual to assign the Task to from the Individual+ field.
5) Click the Assessment tab.
6) Enter a date in Planned Start Date field.
7) Enter a date in the Planned End Date field.
8) Enter comments in the Work Log field as to why the task’s modifications were made.
9) Click the Save button.
10) An AR System User-Note box displays stating that assigned individual has been notified.
11) Click the OK button to close the AR System User-Note box.
12) To return to the Support Console screen, click on the Close button of the Task form.

USE CASE PROCESS DIAGRAM



CANCELING TASKS

Use Case Name:	Canceling Tasks
Description:	Cancel a task that has already been added to an Incident or Problem ticket.
Actors:	Incident Support Incident Manager Problem Support Problem Manager
Status:	Current

FREQUENCY

This use case is to be invoked every time a Task needs to be canceled.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.

- The user is at the IT Service Management Support Console form in Remedy.
- An Incident or Problem ticket has been created.
- A task has been created and related to an existing Incident or Problem ticket.

POST CONDITIONS

- Task has been successfully canceled.

ASSUMPTIONS

- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to cancel a task.
- The user has the correct permissions to cancel a task.
- The status of the Task is “Work In Progress”.
- The status of the Incident is not “Resolved” or “Closed”.

FORM NOTES

Task Information form

Required fields: Summary, Category, Type, Item, Status, Priority and Scope.

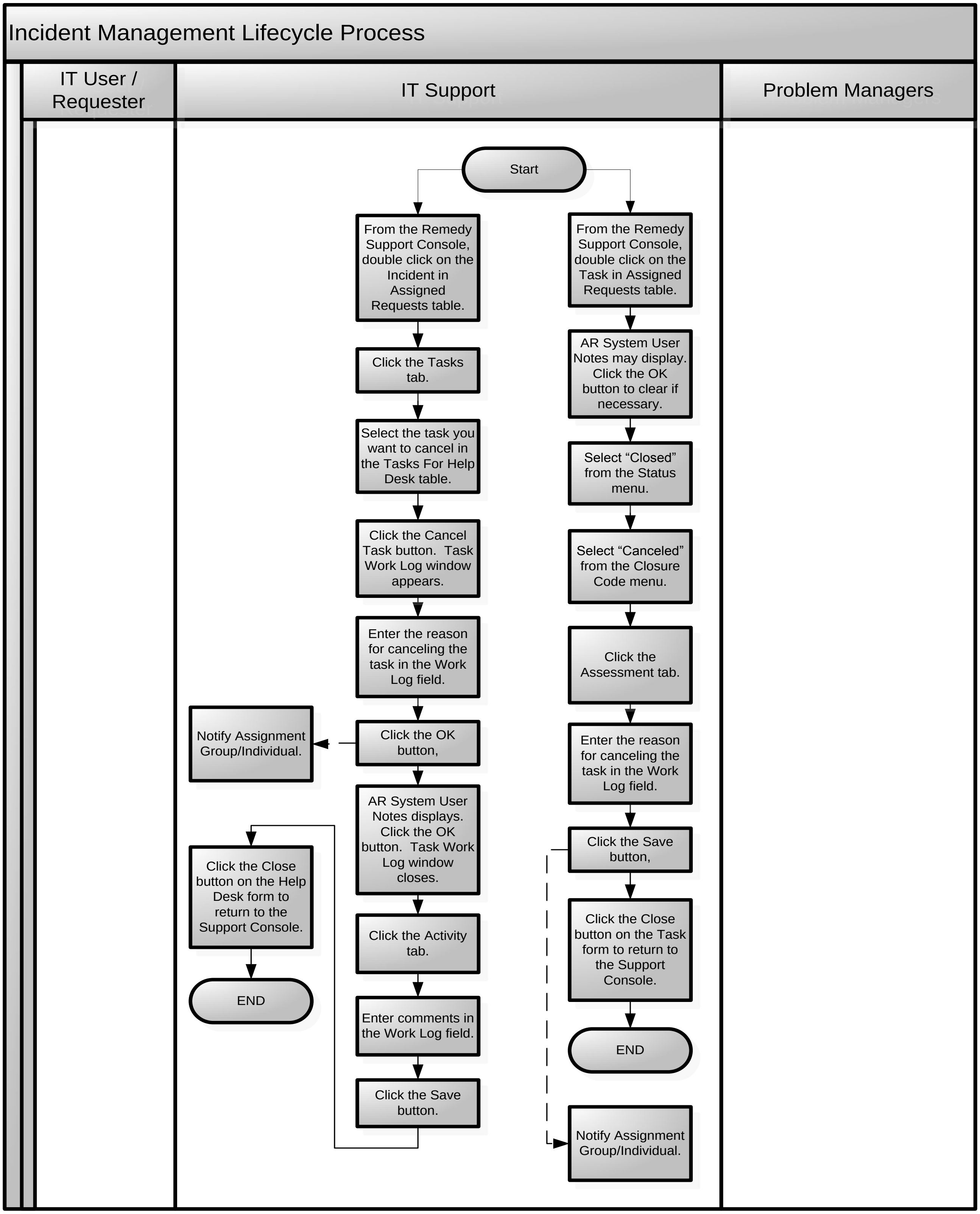
BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Click the Tasks tab.
3) Select the task you want to cancel in the Tasks For Help Desk table by highlighting it.
4) Click the Cancel Task button. A Task Work Log window appears requesting that you enter a reason why the task is to be canceled.
5) Enter the reason why the task is to be canceled in the Work Log field.
6) Click the OK button. The Task Work Log window will close.
7) An AR System User-Note box displays stating that the task has been canceled. If there was an individual assigned to the task, a notification will be sent informing them that the task has been canceled. If there was no individual assigned to the task, a notification will be sent to the associated Support group informing them the task has been canceled.
8) Click the OK button to close the AR System User-Note box.
9) Click the Activity tab.
10) Enter comments in the Work Log field as to why the task cancellations were made.
11) Click the Save button.
12) To return to the Support Console screen, click on the Close button of the Help Desk form.

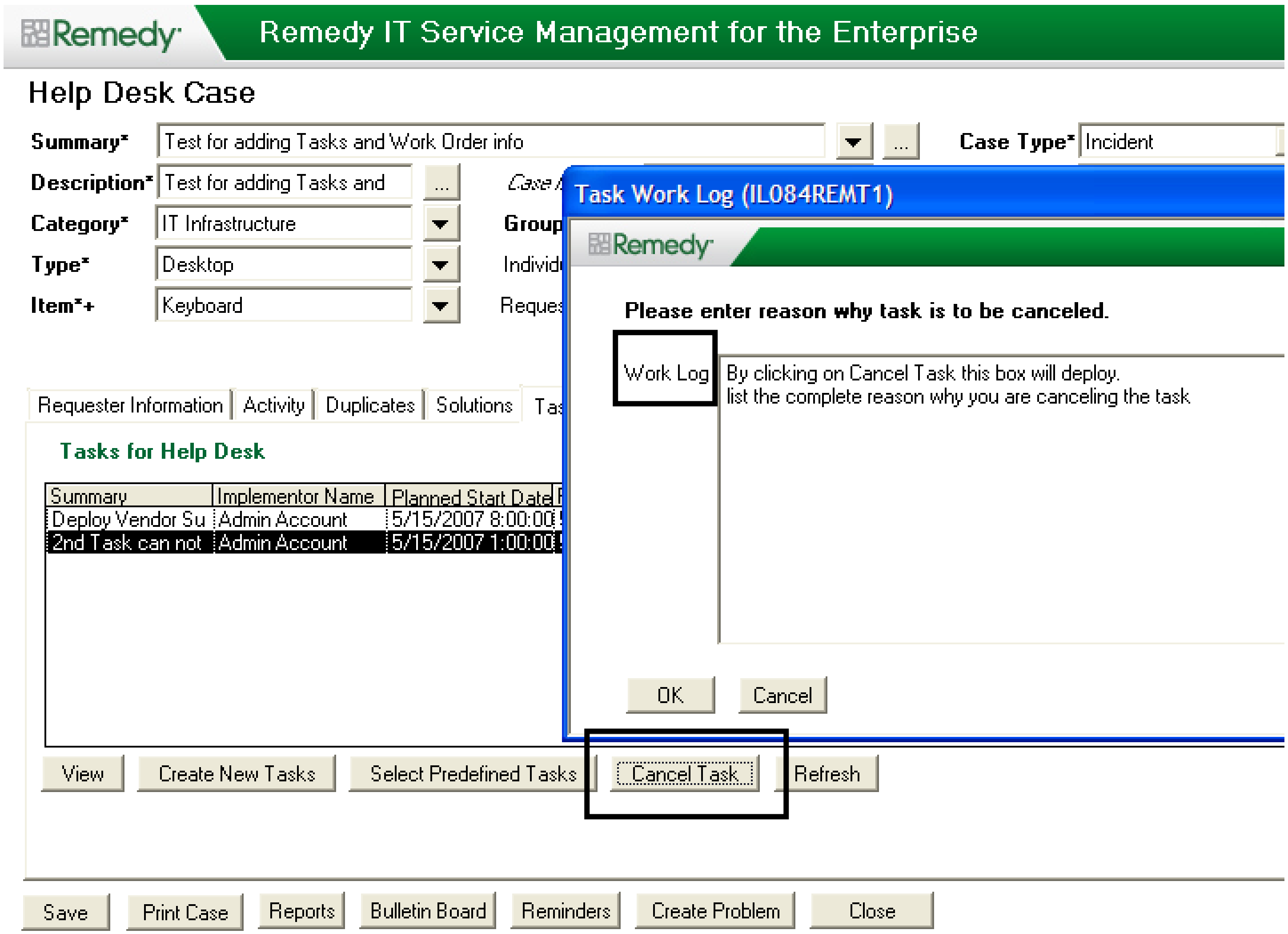
ALTERNATE COURSES OF ACTION

1) From the Remedy Support console, double click on the Task record in the Assigned Requests table. This will open the Task form window with the Task information populated.
2) An AR System User Note box may appear.
3) Click OK.
4) Select “Closed” from the Status menu.
5) Select “Canceled” from the Closure Code menu.
6) Click the Assessment tab.
7) Enter the reason why the Task is to be canceled in the Work Log field.
8) Click the Save button.
9) To return to the Support Console screen, click on the Close button of the Task Information form.

USE CASE PROCESS DIAGRAM



CANCEL A TASK



WORKING WITH RELATED ITEMS

Assets can affect, and can be affected by, help desk cases and change requests. Remedy Help Desk enables you to reduce potential conflicts over IT resources by creating relationships between assets, services, help desk cases, and change requests:

- **Relating assets to other assets-**You can relate an asset to another asset. For example, you might have a printer to which many computers are connected, or a service agreement for your photocopiers. You could create relationships between these asset records, which could help you quickly determine who has access to the printer.

- **Relating assets to services**-You can associate an asset with a related service. For example, you could create a relationship between a computer system on which an email server resides and a service. This could help you quickly determine which services are affected if the asset goes down.

- **Relating assets to change requests-**You can relate an asset record to a change request. For example, if a change request specifies a new asset, you can relate the asset to the change request when you receive the asset.

- **Relating assets to help desk cases-**You can relate an asset record to a help desk case. For example, if the solution to a help desk case is to add more memory to a workstation, you may need to relate the help desk case (there is not enough memory) to the asset record for the workstation (purchasing additional memory).

You can also relate help desk cases or change requests to the current asset record.

TASKS AS WORK ORDERS

Change tasks can also be work orders that have been contracted to outside departments or third party organizations. You can view the work order information through an optional tab.

To specify a task as a work order

1) Open the task.
2) In the Work Order field, select Yes.
3) The Work Order tab is enabled.
4) Click the Work Order tab.
5) In the Company Name field, select a company name.
6) The contacts for that company are listed in the table. You can add, remove, or modify contacts. For more information, see Updating contact information for a work order and Adding or removing contact information for a work order.
7) If you have sent any information to this company about the work order, enter the date it was sent in the Date Info Sent field.
8) If you are expecting a response from the company by a specific date, enter that date in the Date Response Expected field.
9) Add any other relevant comments about the task, such as budget or schedule information.

10) In the Method field, select WebService if the work order is being transmitted via a web service, or select Manual if the work is being transmitted manually.

11) In the Order Accessible field, select Yes if the work order information is available for processing now by way of a web service, or select No if it is not.

12) If the vendor uses confirmation codes for work orders, enter the vendor's confirmation code for the work order.

13) Click Save.

UPDATING WORK ORDER AND COMPANY INFORMATION

You can update information about a work order from the Work Order tab.

To update work order information

1) Display the change task with the work order whose information you want to change.

2) Click the Work Order tab.

3) Make the appropriate updates to the date, comments, or Methods fields.

4) To update company information, use the following procedure.

5) Click Save.

To update company information for a work order

1) In the Work Order tab, click the View button next to the Company Name field.

2) The Company Information form appears.

3) Update the company information at the top of the form as needed.

4) Click the Location tab, and update the company address information as needed.

5) Click the Miscellaneous tab, and enter any relevant information concerning the vendor's lead time for the work order, hours of operation, cost center, time zone, budget code (if any) currency used for the vendor, and any pertinent notes about the work order. This information is optional.

6) Updating contact information for a work order

7) You can update the information about each of the contacts for the company specified in a work order.

To update contact information for a company

1) Display the change task that has the work order whose contact information you need to update.

2) Click the Work Order tab.

3) Click the View button next to the company name.

4) In the Company Information form, click the Contacts tab.

5) Select a contact from the Company Contacts table, and click View.

6) The Contact Information form appears.

7) Update the information as needed.

The Classification tab specifies the type of contact, including organizational area and type of company.

The Contact Details tab provides phone, pager, web, and other contact options.

The Contact Address tab specifies the corporate address for this contact.

1) Click Close to close the Contact Information form.

2) Click Close to close the Company Information form.

3) Click Save to save the new the task information.

4) Click Close.

Adding or removing contact information for a work order

If you have a new contact, or if a contact you are working with is no longer involved with a work order, you can add can add and remove contact names as needed.

To add a work order company contact

1) Display the change task with the work order for which you want to add a contact.

2) Click the Work Order tab.

3) Select a company from the list.

4) Click View.

5) The Company Information form appears.

6) Click the Contacts tab.

7) Click Add.

8) The Contact Information form appears.

9) Enter the contact information:

10) In the top part of the form, fill in the required fields:

11) In the Full Name field, enter the contact's first and last name.

12) In the Status field, select a status of the contact (for example, New if this is a new contact),

13) In the Notification Method field, select the type of notification to be used for the contact (for example, email).

14) The Company Name and company ID fields are filled in automatically.

15) In the Classification tab, fill in the fields:

16) In the Contact Type field, select the type of contact (for example, Primary or Secondary).

17) (Optional) In the Company Type field, enter any relevant information about the company.

18) In the Contact Details field, enter the applicable contact specifics, such as phone number, email address, or pager information. If you selected email as the notification method, you must enter an email address for the contact in the Email field.

19) In the Contact Address tab, enter mailing address information for the contact.

20) Click Save to close the Contact Information form.

21) The new contact appears in the Company Contacts table of the Company Information form.

22) Click Close to close the Company Information form.

To remove a work order company contact

1) Display the change task with the work order for which you want to remove a contact.

2) Click the Work Order tab.

3) From the Company Name field, select the company with the contact you want to remove.

4) Click View.

5) The Company Information form appears.

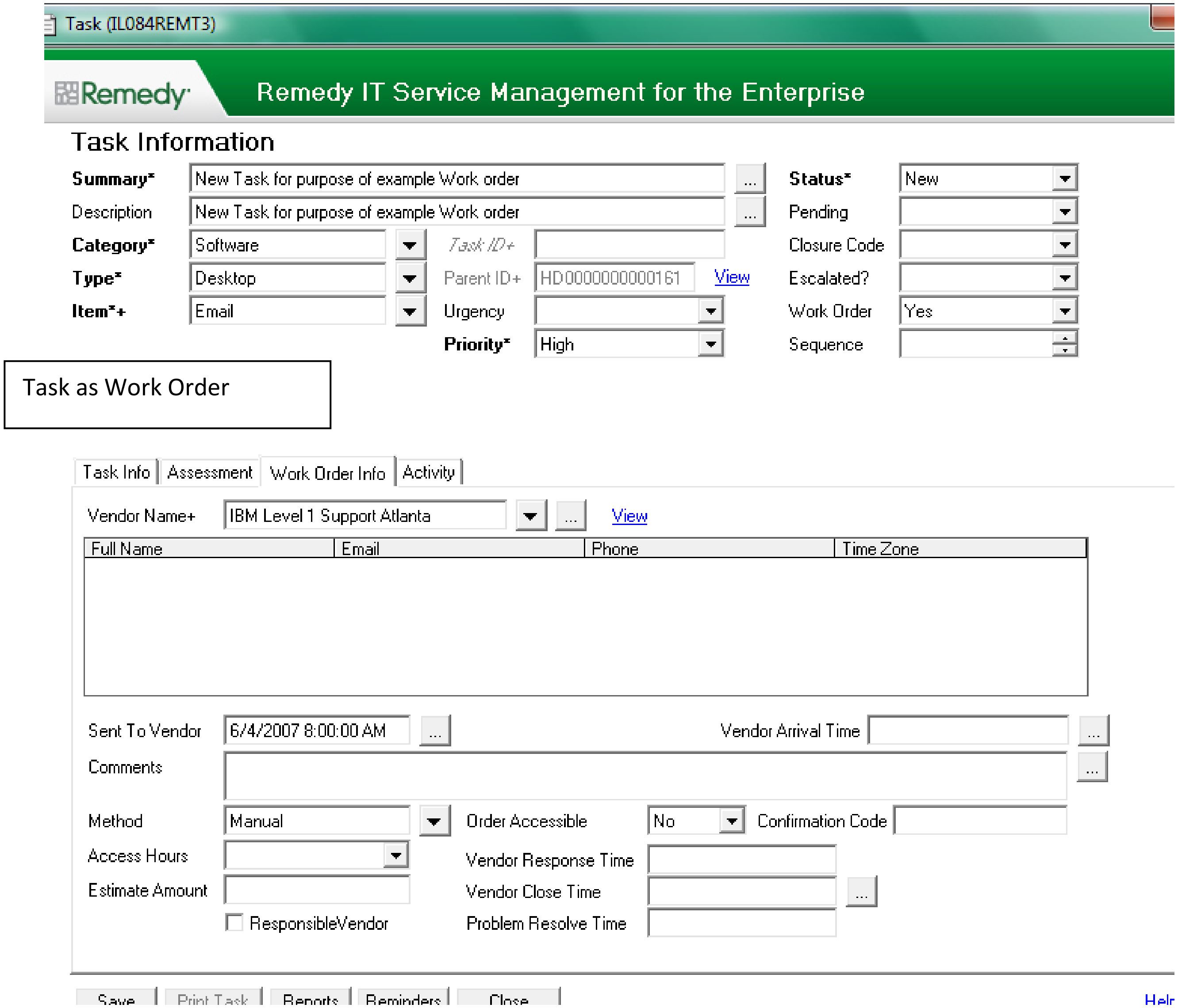
6) Click the Contacts tab.

7) In the Company Contacts table, select the contact you want to remove.

8) Click Remove.

9) Click Save.

10) Click Close to close the Company Information form.


Task (IL084REMT3)
Remedy
Remedy IT Service Management for the Enterprise
Task Information
Summary*
New Task for purpose of example Work order
Description
New Task for purpose of example Work order
Status*
New
Pending
Closure Code
Escalated?
Work Order
Yes
Sequence
Category*
Software
Type*
Desktop
Item*+
Email
Task ID+
Parent ID+
HD0000000000161
View
Urgency
Priority*
High
Task as Work Order
Task Info
Assessment
Work Order Info
Activity
Vendor Name+
IBM Level 1 Support Atlanta
View
Full Name
Email
Phone
Time Zone
Sent To Vendor
6/4/2007 8:00:00 AM
Vendor Arrival Time
Comments
Method
Manual
Order Accessible
No
Confirmation Code
Access Hours
Vendor Response Time
Estimate Amount
Vendor Close Time
ResponsibleVendor
Problem Resolve Time
Save
Print Task
Reports
Reminders
Close

RELATING AN EXISTING HELP DESK CASE OR CHANGE REQUEST TO AN ASSET

You can relate an existing help desk case or change request to the current asset from the Related Items tab on the asset record.

For example, a support technician might create a new help desk case about a printer being down. The technician can use the asset record in Remedy Asset Management to open the asset record for the printer and relate the help desk case to it.

Or, if a change request requires installing a part for a printer, a technician can relate the asset record to the change request when the part is received.

TO RELATE AN EXISTING HELP DESK CASE OR CHANGE REQUEST TO AN ASSET:

1) Search for the asset and open it.
2) Click the Related Items tab.
3) From the Record Type list, select Help Desk Case or Change Request.
4) Click Search.
5) The Search and Relate dialog box appears.
6) The Search results appear in the table. The Search For field contains Help Desk Case by default. The Search with the Same field contains Category, Type, and Item by default.
7) Choose an option for your search.
8) For a predefined search, select different search criteria from the Search with the Same list.

Type of search	Description
Search with the Same Region, Site, and Department	Searches for help desk cases or change requests with the same site, region, and department as the asset record.
Search with the Same Category, Type, and Item	Searches for help desk cases or change requests with the same category, type, and item as the asset record.

For an advanced search, click the Advanced tab and enter additional search criteria to narrow your search.

1) Click Search.

2) A list of records matching your search criteria appears in the Search Results table.

3) To display the help desk case or change request, select the appropriate item and click View.

4) Close the help desk case or the change request.

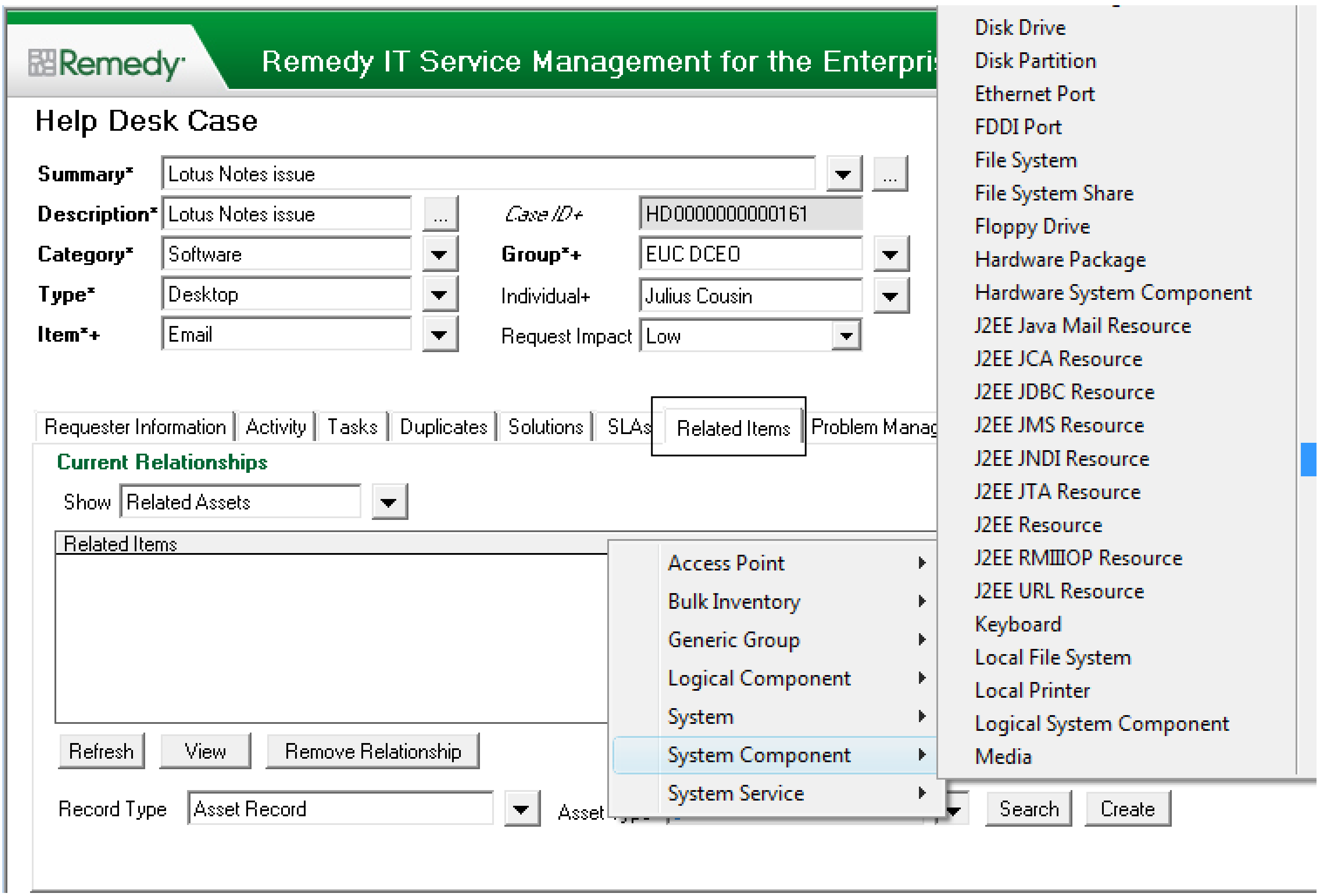
5) If you want to relate an existing help desk case to the asset record, select the item from the Search Results table and click Relate.

6) A confirmation message appears.

7) Click OK.

8) Click Close to close the Search and Relate dialog box.

9) The help desk case or change request you related appears on the Related Items tab.


Remedy
Remedy IT Service Management for the Enterpri
Help Desk Case
Summary*
Lotus Notes issue
Description*
Lotus Notes issue
Case ID+
HD0000000000161
Category*
Software
Group*+
EUC DCEO
Type*
Desktop
Individual+
Julius Cousin
Item*+
Email
Request Impact
Low
Requester Information
Activity
Tasks
Duplicates
Solutions
SLAs
Related Items
Problem Manag
Current Relationships
Show
Related Assets
Related Items
Refresh
View
Remove Relationship
Record Type
Asset Record
Asset
Search
Create
Access Point
Bulk Inventory
Generic Group
Logical Component
System
System Component
System Service
Disk Drive
Disk Partition
Ethernet Port
FDDI Port
File System
File System Share
Floppy Drive
Hardware Package
Hardware System Component
J2EE Java Mail Resource
J2EE JCA Resource
J2EE JDBC Resource
J2EE JMS Resource
J2EE JNDI Resource
J2EE JTA Resource
J2EE Resource
J2EE RMIIIOP Resource
J2EE URL Resource
Keyboard
Local File System
Local Printer
Logical System Component
Media

PENDING AN INCIDENT OR PROBLEM

Use Case Name:	Pending an Incident or Problem
Description:	The modification of an existing Incident or Problem (via Remedy desktop client or web client) by an end user to a pending state.
Actors:	Incident Support Incident Manager Problem Manager Problem Support
Status:	Current

FREQUENCY

This use case is to be invoked every time an Incident, Question or Problem needs to be placed in a pending state.

PRECONDITIONS

- The user is logged into the Remedy Help Desk application.

- The user is at the IT Service Management Support Console form in Remedy.
- An Incident has been created and assigned to a group/individual.

POST CONDITIONS

- The Incident has been given a status of “Pending”.

ASSUMPTIONS

- The Incident or Problem has all required data elements/fields completed.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct licensing to pend an Incident.
- The user has the correct permissions to pend an Incident.
- The Incident does not possess a status of “Resolved”, “Closed”, or “New”.

FORM NOTES

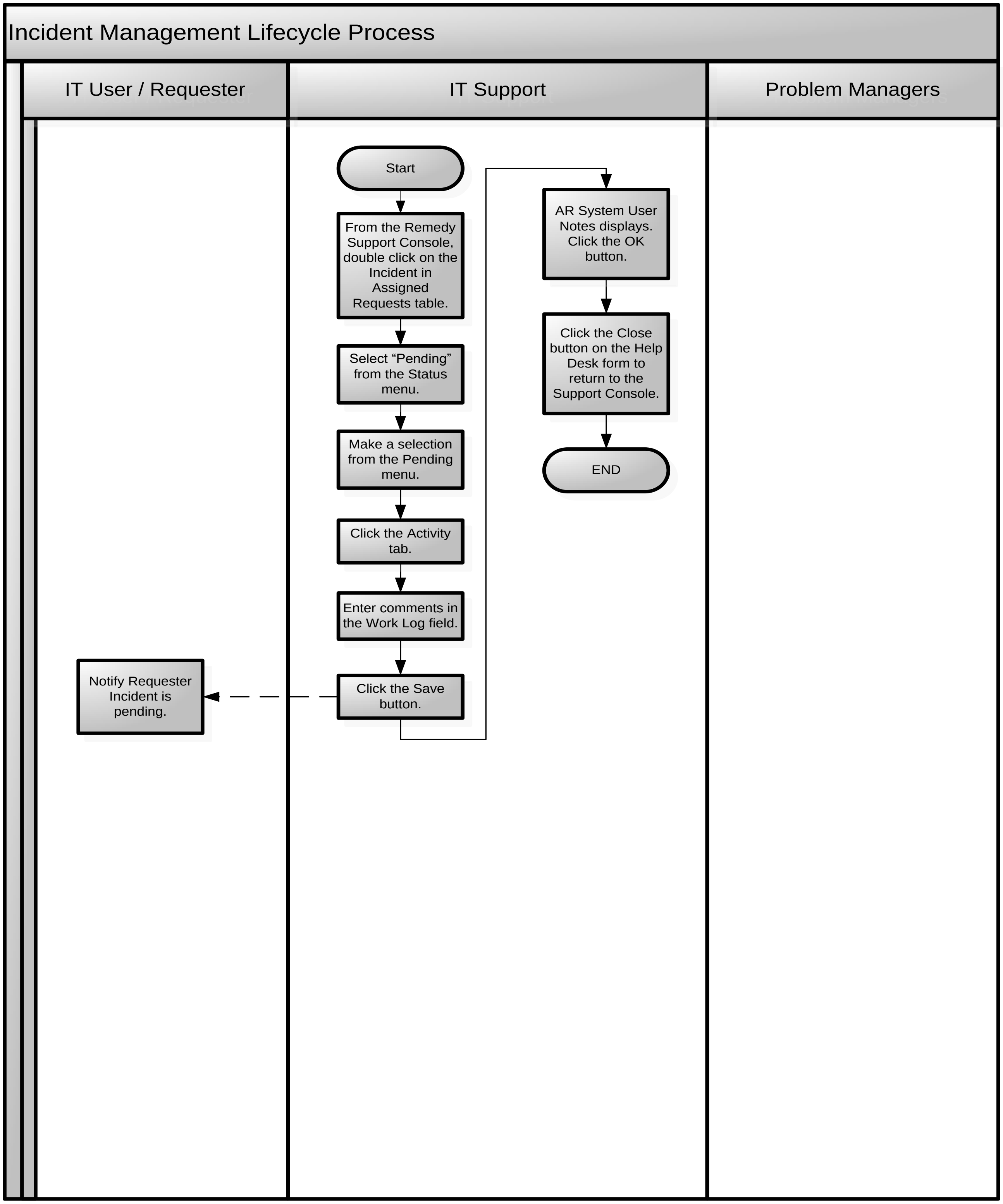
Help Desk Case Information form

Required fields: Summary, Description, Category, Type, Item, Case Type, Status, Priority, Login, Name, Source and Group.

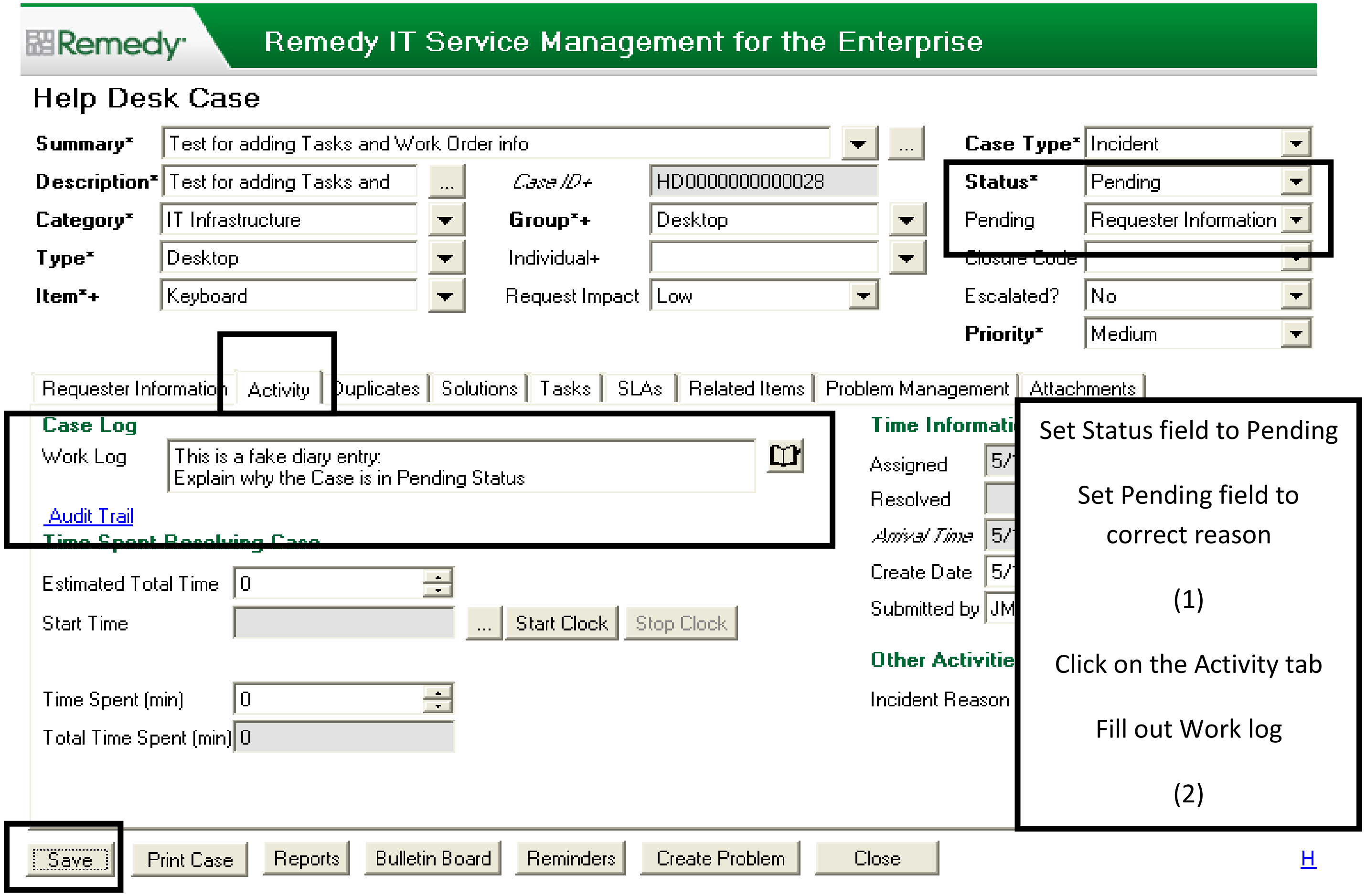
BASIC COURSE OF ACTION

1) From the Remedy Support console, double click on the Incident record in the Assigned Requests table. This will open the Help Desk form window with the Incident information populated.
2) Select “Pending” from the Status* menu.
3) Select one of the following values from the Pending menu: Parts, Requester Information, Problem.
4) Click the Activity tab.
5) Enter comments in the Work Log field.
6) Click Save.
7) An AR System User Note message displays indicating that the requester has been notified that the Incident is pending.
8) Click the OK button.
9) To return to the Support Console screen, click on the Close button of the Help Desk form.

USE CASE PROCESS DIAGRAM



PENDING AN INCIDENT OR PROBLEM



CREATE REMINDERS

Reminders are a great way of providing "Tickler information" to come back to a Case, such as a Case in Pending Status.

Use Case Name:	Create Reminders
Description:	Any end user to the Remedy ITSM application suite has the ability to create and review reminders. Reminders are notifications which can be associated to a specific ITSM record (i.e. Help Desk or Change Request) or the reminder can stand alone. A Reminder can be scheduled to notify a specific group or individual.
Actors:	Requester – person initiating the request End User Service Desk agent IT Support Staff
Status:	Current

FREQUENCY

This use case is to be invoked every time a requester or end user would like to create a reminder.

PRECONDITIONS

- The user is logged into the client user or web tool.

- The user is at the Requester or Support Console form in Remedy.

POST CONDITIONS

- A reminder is created which is either associated to an ITSM record (Help Desk or Change Request) or the reminder stands alone.

ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- Assignment information is stored in the SHR:Assignment form and is based upon the Category, Type, Item, Region, Site and Department given on the Incident or Problem ticket.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct permissions to create a new reminder.

FORM NOTES

Reminder Information

Required fields: Notification, Time, Message, Notify, Recipient

Optional fields: Link-to-Request-ID, Form, AR Login, Email, Subject, Log.

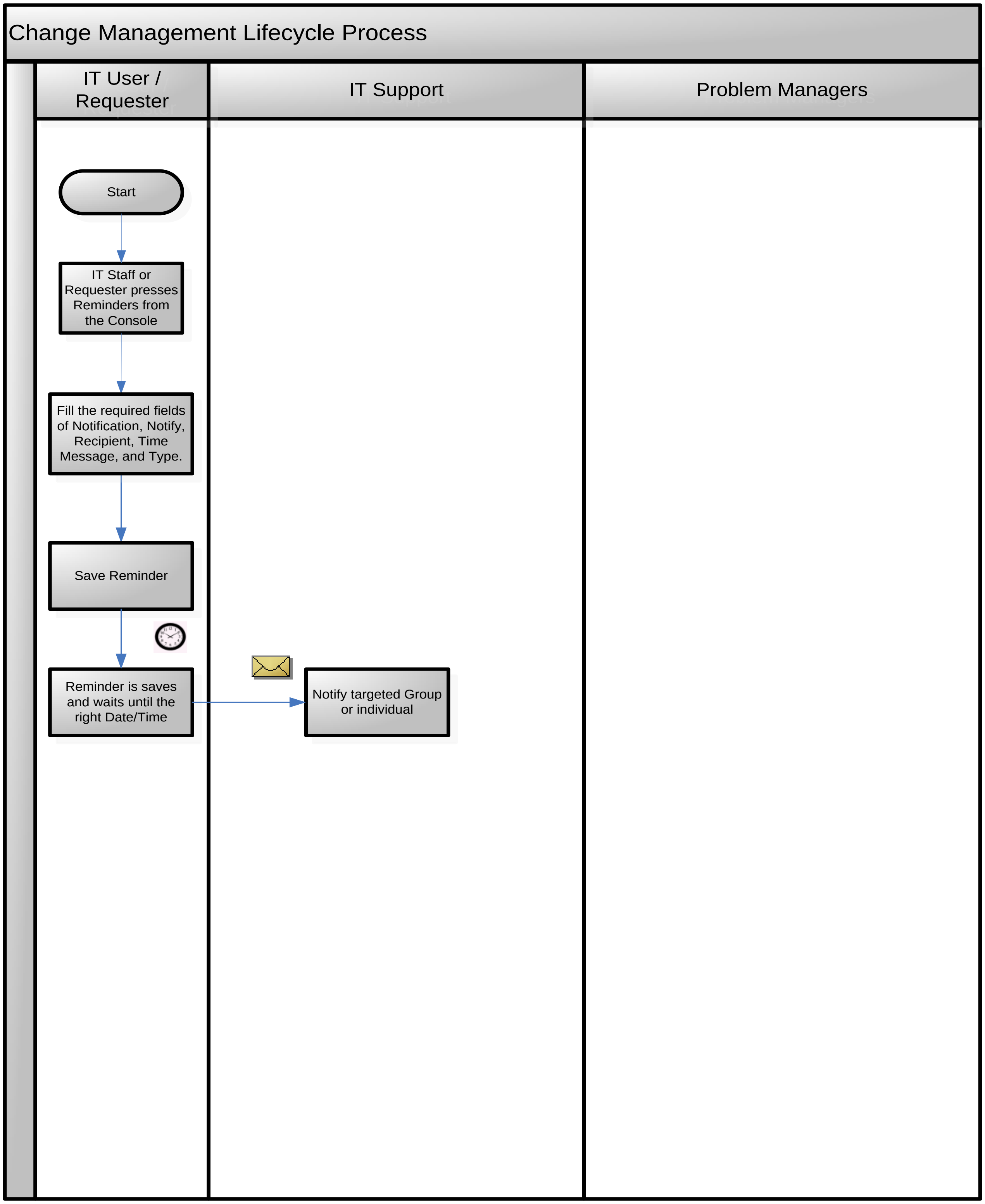
BASIC COURSE OF ACTION

1) From the Remedy Support or Requester Console, click on the Reminders link. This will open a dialog window for the reminder where the end user can either review existing reminders or create a new reminder.
2) Click on Create Reminder tab.
3) Since the reminder is from the console, the Link-to-Request-ID and Form are blank.
4) In the Notification field, select the type of notification from the menu.
5) In the Time field, select the date and time when the reminder notification will be issued.
6) In the Notify field, select whether the notification will be sent to an Individual or a Group.
   Note: The selection of this field will determine the query type in the Recipient field.
7) In the Recipient field use the type-and-search function to query for the notification individual or group. When the end user selects the group or individual, the value will be placed in the field.
8) Enter a statement in the message field.
9) All other fields are optional.
10) Once completed, press Save button.
11) The Reminder will trigger when the Appropriate Date/Time is reached.
12) A Notification is issued to the recipient based on the Notification rules.

Alternate Courses of Action

1) If the end user opens the Reminder option from an ITSM record (Help Desk or Change Request), the Link-To-Request-ID and Form will automatically be filled.

USE CASE PROCESS DIAGRAM



REPORTS OVERVIEW

The reporting tool in Remedy User enables you to generate reports for requests from a search. For example, if you work in Customer Support, you might want to create a report that lists all the calls that you handled that day and sorts them according to whether they are resolved. To do this, you would first search for all the support calls you handled that day. Then you would run the report.

You can create a new report, or you can choose a previously created custom report and modify it as necessary. You can save the report as a custom report; you can also run the report and send it to the screen, a printer, a file, or another application.

CREATING REPORTS

To create qualifications for reports

1) In the Report Console, enter the search criteria for the report you want to generate.
2) In the first column (Field <n>), select a field on which you want to search.
3) In the second column (Operand), select an operator; for example, = (the equal sign) for matching entries.
4) In the third column (Value), enter a value by which you want to search. For example, to find all Help Desk cases assigned to Bob Backline, enter Bob Backline as the value.
5) Repeat these steps to refine the search further.
6) You can also use the advanced search bar to specify a qualification.
7) Click the Advanced Qualification button.
8) The Advanced Qualification Builder dialog box is displayed.

9) In the Qualification field, enter the criteria for the report data you want.

10) You can enter the qualification manually, or use buttons and selection lists to build your qualification. The selections you make appear in the Qualification field.

11) Select Save.

12) The search criteria you selected appear in the Qualification field of the Report Console.

13) To save the qualification for future use, click Save Qualification.

14) In the dialog box that appears, enter a name for the qualification, and click Save.

15) Select a destination for the report.

16) Screen displays the report in a separate window.

17) Printer enables you to print the report at a printer you specify.

18) File enables you to store a copy of the report to a directory you specify.

19) Click Run Report. SELECTING REQUESTS TO INCLUDE IN A REPORT

20) Before you create, view, or generate a report, determine which requests you want to include.

21) To select requests to include in a report:

1) Open a form and perform a search.

2) From the search results list, select the requests you want to include in the report. Verify that the requests you selected are highlighted.

3) Create the report.

To include all requests in a report:

1) Deselect all requests in the search results list. (By default, the first request is always selected when the search results list is displayed.) Verify that none of the requests is highlighted.

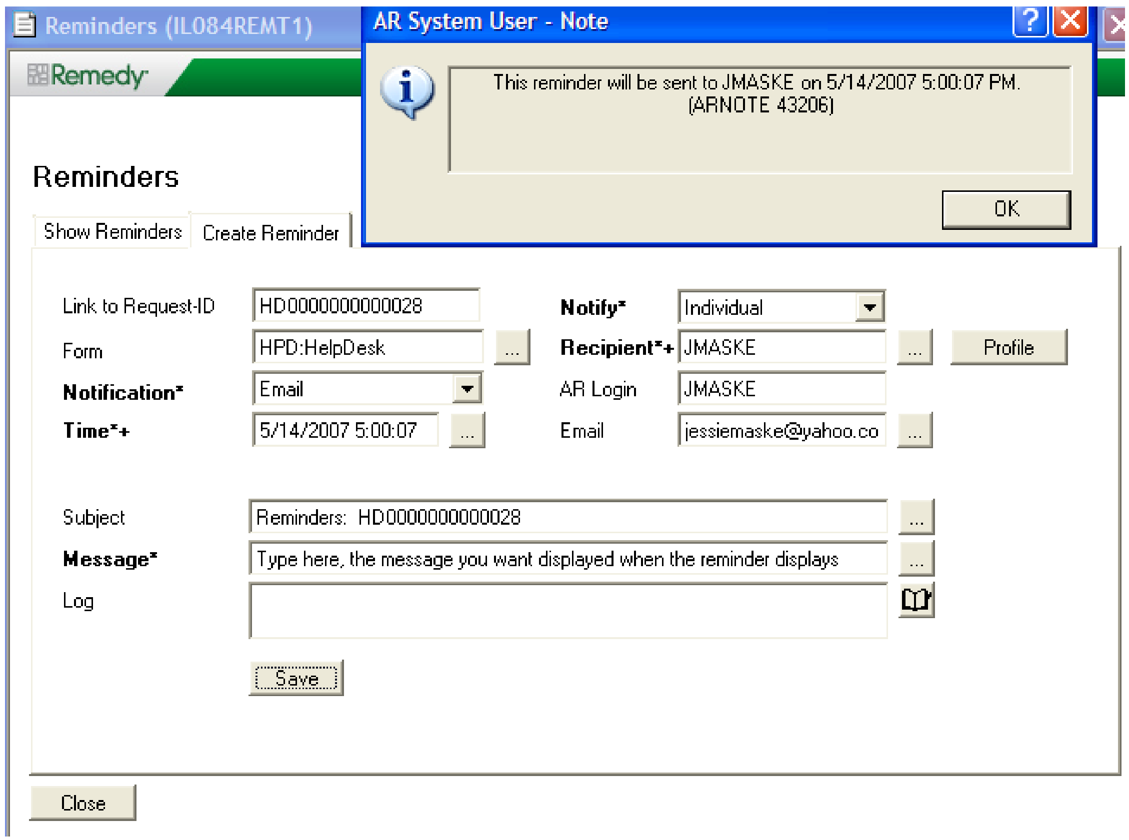
2) Open the form in search mode and enter your search criteria.

3) Do not click Search. Generate the report.

REMINDERS

- Reminders enable you to create notes for yourself and others. You can send them by email or by Remedy Alert, and you can specify when they will be sent.
- You can create generic reminders, or you can create reminders that are associated with specific requests. For example, you can send yourself a note about a specific help desk case to remind yourself to follow up on the problem.
- Whether you access reminders from the Requester Console or from within a request determines which reminders you will be able to view.
- When you open the reminders dialog from the Requester Console, you can view all reminders that you have created.
- When you open reminders from within a request (if you have a request form open), you can view all reminders associated with that request. This includes reminders created by other users of Remedy Help Desk.

CREATE REMINDERS



REVIEW BULLETIN BOARD MESSAGES

Use Case Name:	Review Bulletin Board Messages
Description:	Any end user of the Remedy ITSM application suite has the ability to review messages posted to a central Bulletin Board. The Bulletin Board is viewable from the Requester, Support, and Management consoles.
Actors:	Requester – person initiating the request End User Service Desk agent IT Support Staff
Status:	Current

FREQUENCY

This use case is to be invoked every time a requester or end user would like to review the Bulletin Board.

PRECONDITIONS

- The user is logged into the client user or web tool.
- The user is at the Requester or Support Console form in Remedy.

POST CONDITIONS

- The user reviewed an existing Bulletin Board message.

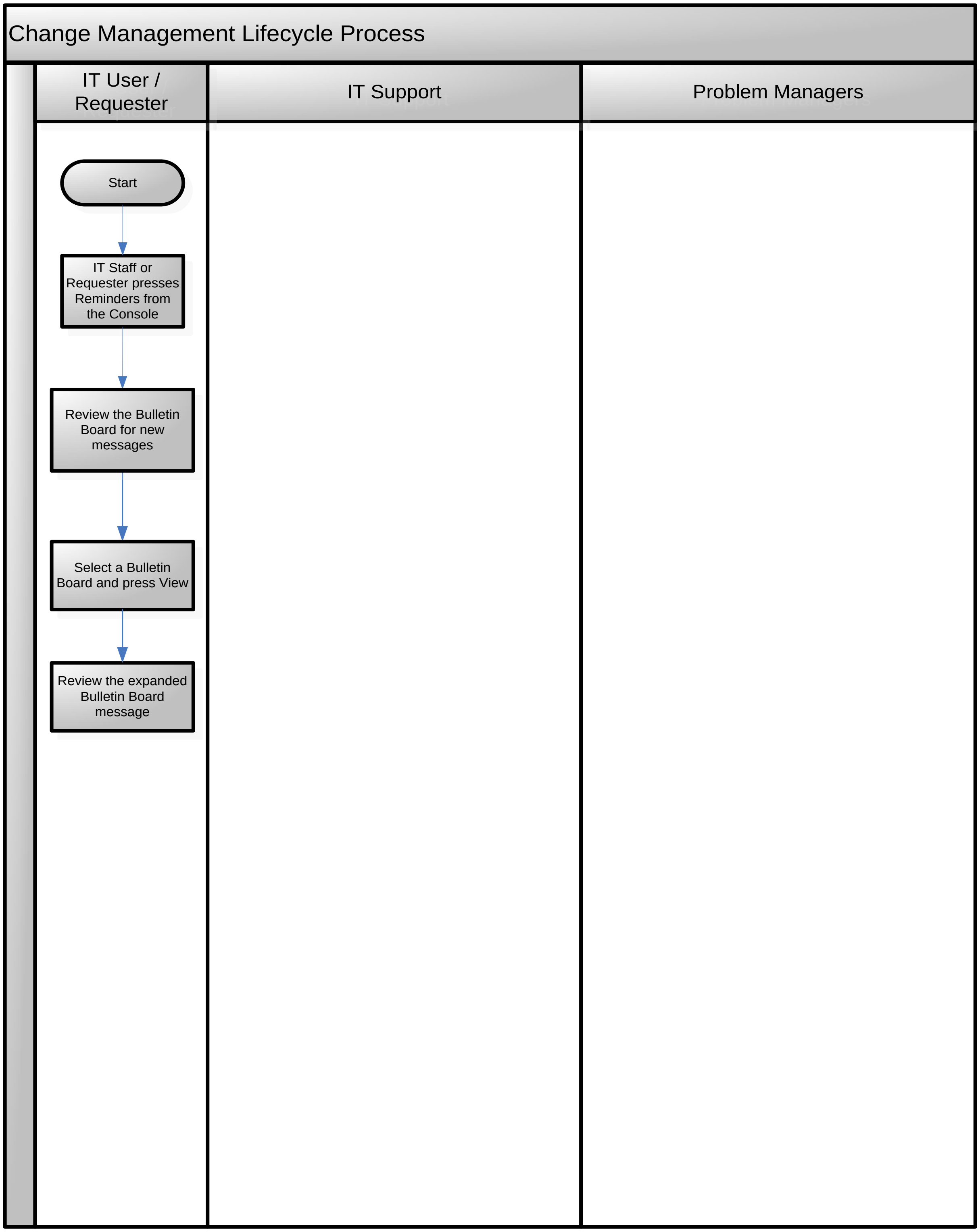
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- Assignment information is stored in the SHR:Assignment form and is based upon the Category, Type, Item, Region, Site and Department given on the Incident and Problem tickets.
- The user has a valid login and password for the Remedy Help Desk application.
- The user has the correct permissions to review the Bulletin Board.

BASIC COURSE OF ACTION

1) From the Remedy Support or Requester Console the end user can view the Bulletin Board to see if a pertinent message exists.
2) The end user can select a message in the Bulletin Board table and press the View button.
3) The Bulletin Board message expands to provide more information (including attached files).
4) The end user can press the Close button to close the open Bulletin Board message.

USE CASE PROCESS DIAGRAM



ENTERPRISE SERVICE REQUEST

The Service Request System Project has been designed to create an enterprise-wide, centralized repository for managing, planning and monitoring Infrastructure service changes and associated work requests. The benefits derived from this project include the creation of a centralized Service Management system and the creation of a work tracking system for Infrastructure Leads transferring to CMS. To this end, the State of Illinois has adopted ITIL best practices and has implemented the use of the Remedy ITSM product suite.

This guide has been developed to provide detailed information on how to navigate and use the Remedy ITSM Change Management application as modified by the State of Illinois. It is intended for use by support staff, technician staff, and managers who provide support services to help resolve service related problems and implement changes to maintain and enhance the State of Illinois infrastructure.

In order to accommodate timelines set for the transition into the Shared Services environment, CMS BCCS has assembled an "interim Enterprise Service Request System Process" that will begin the progression toward the common goal of a common work management solution.

This interim process incorporates the use of the Remedy Service Request (as defined in this guide), existing Agency processes for approving, tracking and coordinating work (such as OATS), and a new electronic (non-Remedy) form called the Enterprise Service Request.

GETTING HELP

If you need help after taking this course, email one of the following:

- Chris Gordon, Infrastructure Enterprise Change Manager – 217-524-4784
- Tom Seagraves – IT Service Desk / Enterprise Service Request – In Springfield: 217-524-4784 Outside Springfield: 800-366-8768

If you need help after you are live on the Remedy system, contact the local CMS IT Service Desk at: (217) 524-4784

REMEDY CHANGE MANAGEMENT

OVERVIEW

The BMC Remedy Change Management application provides a system of planning, scheduling, implementing, and tracking changes (including ESRs) that need to be completed within your organization. Using Change Management in combination with other BMC Remedy applications enables you to:

- Assess the scope of the change.
- Analyze the costs associated with the change (in terms of time and expense).
- Perform impact and risk analysis.
- Schedule the resources needed to complete the change.
- Define service targets and measure the efforts of your support staff as they implement the changes while using the Service Level Management module.

WORKING WITH REMEDY CHANGE MANAGEMENT

The Remedy Change Management application enables your organization's service desk to implement and manage your Change Requests. The various members of your organization can use different versions of the Remedy Change Management application, based on their roles.

The requester is someone in the organization who needs to have a change implemented and uses the Remedy Requester application to create the Change Request. A certain member of your organization will be the requester.

The Remedy IT Service Management for the Enterprise Requester Console is the primary interface for the requester. From the console, you can create a Change Request and submit it to the system, and you can search for and view previously created requests.

The procedures here describe the tasks you can perform as a requester.

If you have Remedy Help Desk installed, the Requester Console will have additional functionality. Only the functionality that pertains to Remedy Change Management is described here.

AUTO-FILL

As you work with the forms and dialog boxes, you might see a plus sign (+) included in a field label. You can type part of the information in these fields and press ENTER. If an exact match is located, the system automatically completes the field. If a selection list appears, double-click on the item you want to put in the field. Using auto-fill fields and lists is faster, more consistent, and more accurate than typing the information yourself.

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  IT Service Desk / Enterprise Service Request – In Springfield: 217-524-4784 Outside Springfield: 800-366-8768

OPENING A NEW SERVICE REQUEST

22) From the IT Service Management Console, select the Create Request quick link.

23) The Select A Request Type dialog will display.

24) From the Select A Request dialog, select Change Request to open the Service Request.

BUSINESS RULES ASSOCIATED WITH OPENING A NEW SERVICE REQUEST

Initiation to open a new Service Request

Note: Fields that will show on the ESR Electronic Form: Requested For, is Requester, Requested By, is the IT Coordinator

The Requester is the person the work is being done for. The Requester must be authorized to submit the ESR form.

The Requester By will have a limited license so that CMS can control the number of people that will be acting in the role as Requestor.

Description: An Agency / Customer identifies a need for requesting service and takes necessary steps to seek internal approval(s) to initiate a request with CMS through their authorized methods.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
1a.	Authorize the need to open a new Service Request.	N/A	Requested For	Contacts their identified / authorized agency Requested By regarding opening a request.	Requested For is responsible to solicit their designated agency Requested By only for all requests for service.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				Provides detailed information on the purpose and specific need for request. Provides up to date contact and affected asset tag(s) information. Identifies time frame or expectation to complete request (Urgency and Requested Date fields).	Requested For is responsible to consult with designated Task Coordinator or Requested By to check on the status of an opened request. Requested For or a designee is responsible to be available at the date and time that the Support Technician would be onsite to complete the work (when applicable).
1b.	Gain internal approval(s) to justify submitting a new Service Request.	N/A	Requested By	Consults with Requester to identify / validate Service Request work details. Reviews Requester contact and asset details for correctness. Identifies necessary approval steps and may consult with Management to gain sign off authorization to open a new Service Request.	Requested By is responsible for identifying all internal approvals required to authorize the process of initiating a Service Request. Requested By is responsible for ensuring that all agency specific policy / audit requirements are followed when gaining the internal approvals for initiating a Service Request.

BUSINESS RULE ASSOCIATED WITH ESR ELECTRONIC FORM:

Submit a Service Request form to the CMS Service Desk

Description: Authorized agency Requested By completes ESR Form Attachment and submits an Email to the Service Desk to initiate a new Service Request. Service Desk will review request to ensure authorized approver is documented before creating a new request.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
2a	Fill out ESR Form Attachment.	N/A	Requested By	Downloads ESR Form Attachment from CMS. Documents the ESR Form Attachment; ensures that all required fields are completed including the authorized approver name, details about the request, name and contact information, and asset / inventory tag information (when applicable). Consults with the Requested For to confirm Urgency and to review that	Requested By is responsible for consulting with the Requested For to confirm the specific needs and Urgency, as well as reviewing and verifying that contact information and asset / inventory tag(s) related to the request are correct / up to date. Requested By is responsible for identifying the necessary Task Coordinator(s) at the agency end and for documenting this information in the ESR Form Attachment. Requested By is responsible for

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				all request details, contact and Asset information are correct.	completing the ESR Form Attachment with all required information, accurate and detailed, in a timely manner. Requested By is responsible for keeping the Requester informed on the status of the request as needed and to follow up with the Service Desk to request a status check on the request.
2b	Email Service Desk with ESR Form Attachment to initiate opening a new Service Request.	N/A	Requested By	Submits an Email to the Service Desk and includes the ESR Form Attachment. Consults with Service Desk to provide additional details related to the request (when applicable). Retains electronic or hardcopy records of request to meet agency specific policy / audit requirements.	Requested By is responsible for Emailing the Service Desk the Requesters completed ESR Form Attachment with all required information, accurate and detailed, in a timely manner. Requested By is responsible to follow up in providing any additional information or details of the request when consulted by the Service Desk (as needed).

COMPONENTS OF THE SERVICE REQUEST FORM

The Service Request form is comprised of the following sections:

- Header - Contains the categorization and the details of the Service Request.
- General Tab – Contains details about the person that has requested the service. Additionally, it defines the group and individual that has been assigned the request.
- Assessment Tab – Contains information that defines the time that the service has been scheduled and the estimated risk involved with performing the request.
- Tasks Tab – Display information on the tasks that are needed to complete the request. This tab will only be available after the request has been saved for the first time.
- Activity Tab – Contains detailed information on the work that is being performed per the request.
- Related Items Tab – Allows users to link assets, other Service Requests, or Incidents to their Service Requests.

COMPLETING THE HEADER – CORE FIELDS

The Header section of the Service Request form contains fields that define the details of the request. All Service Requests must be identified by a summary and a categorization, must be given a Priority, and will have a defined status.

The Summary is a required field and provides a brief and concise description of the service that is being requested. The information that is entered in this field will become the subject line for all e-mail or paging messages related to the request. There are 2 ways to add a summary. Users may select the field's associated pull-down menu to view a list of predefined, frequently seen summaries. If the required summary information does not appear on the displayed list, users can manually enter a summary.

Note: Telecom: Use the Pre-defined list for summaries, if none are correct for the incident consult your supervisor, the supervisor will contact support to arrange for proper Pre-defined Summaries to be created for proper CTI and Groups.

When a summary is selected from the menu, it will automatically populate the requests categorization fields. For manually entered summaries, the categorization must be manually selected by using the menus associated with the Category, Type and Item fields.

The Description field is a required field and provides a location for users to give detailed information regarding the change. The type of information that will be placed in this field will depend on the type of Service Request being created. Information from the Electronic ESR Form must be transferred into the description and populated into other fields. If information is placed into this field then EUC will not have to open the attached ESR every time they need specific tags, and information from the form. Displayed information may be changed until such time as the request is given the status of "Work In Progress".

Note: Telecom: This is a critical field because it is copied and pasted into e-mail. It must be complete. As an example a Telecom Description should include who, what, when, where, how, More More More!!!

- The Description field is unlimited in size.
- Users can manually enter information into the field or they may paste information from other documents into this field.
- The Description field does not allow attachments.
- Use the Description field to give detailed information on the service that is required. For example, if a desktop needs to be moved from one location to another, list the location information in the Description field.
- The Category, Type and Item (CTI) fields are required fields, and identify the categorization of the Service Request. Because these fields are critical to the correct routing of tickets, metrics calculations, and reporting, entries for these fields must be selected from the fields' associated menus. You cannot manually enter information into the CTI fields. These fields work together in a cascading manner, so that once the Category has been selected, the Type field's menu only displays selections that are associated with that Category. Once the Category and Type are selected, the Item menu will only display selections that are associated with the selected Category and Type. The combination selected for the CTI fields must be a valid combination in order for the Service Request to be saved.

SELECTING THE CORRECT CTI

This phase of the Service Request deployment focuses on the creation of Service Requests for the following items:

The standard Change CTI actions are Install, Change, Move, or Remove

MOVES

- Relocation of offices and all infrastructure found within the office.
- Relocation of desktop and/or desktop peripherals.

ADDS

- Access to required systems for new state employees upon HR notification.

CHANGES

- Changing standard software configuration settings on desktops or servers.
- Install/Push of standard software configurations of the Microsoft Enterprise Agreement (MSEA) and commonly deployed software (Visio, PowerPoint, Adobe, Acrobat, etc.).
- Changing access to systems when employees transfer to different agencies.
- Installation of specialized software required by a business unit or job function.
- Installation of accessory desktop components and/or peripheral upgrades.

Remove

- Decommission a printer

For example:

A new user needs to be added to MS Active Directory, Novell NDS or another server. The appropriate CTI would be:

- Category = Services
- Type = User
- Item = Add

If a new user needs to be setup for Email, the correct categorization would be:

- Category = Software
- Type = E-Mail
- Item = Install

If a new user needs a PC installed, the correct categorization would be:

- Category = Hardware
- Type = Desktop
- Item = Install

A good rule of thumb when selecting a CTI is to review the various options and select the combination that best describes the issue – even if the selection is not exact. Remember you can always use the Summary and Description fields to provide additional details and information.

The CTI of the request may be modified up until the time that the request is given the status of “Resolved”.

REQUESTING A NEW CTI

Requests for new CTI's should first be discussed with your manager. If there is no resolution the manager should contact : Gary Wasilewski, CSC Quality and Assurance 217-557-8000 Gary.Wasilewski@illinois.gov. Submitted requests must include a justification describing why the new CTI is required and a list of the Group (or Groups) that will support the CTI. All requests will be evaluated and must be approved by Management prior to inclusion.

ADDITIONAL HEADER FIELDS

Business Justification - Optional - Allows users to define why the request is being created. Entries must be selected from the field's associated menu. Options are: Corporate Strategic, Business Unit Strategic, Maintenance, Defect, Upgrade, Enhancement, Customer Commitment, and Sarbanes-Oxley. The system default is set to Service Request.

- Change ID+ - System-generated - Displays the Request ID (reference number) assigned to the request.
- Priority* - Required - Defines the precedence of the request. Options are: Low, Medium, High and Critical. (Priority is a field that is looked at as extremely important and should be set accordingly)
- Urgency – **(Telecom: This field should be set in accordance with the Priority field)** Optional - Defines the importance of the request from the Customers perspective. Options are: Low, Medium, High and Critical. (Customers perspective on Change)
- Change Type – Required - Defines the class of the request. Options are: Change, Service Request, Project, and Release. The choice for a normal Request should be Service Request.

Status – Required - Defines the position of the request as it moves through its lifecycle.

Options are: New, Assigned, Planning, Scheduled, Work In Progress, Pending, Resolved or Closed.

Status Codes	**Description**
New	This is the default status when the Service Request is initially created. A Service Request may only be in the status of "New" one time. In "New" status, a Service Request cannot be saved unless there is a group defined in the requests Group+ field.
Assigned	When a new Service Request is saved, it is immediately given the status of "Assigned" and routed to a group for work. The Service Request should remain in the status of "Assigned" until the planning of the request begins. **Note: Telecom: when a ticket has an assigned status it is imperative the Requester receive acknowledgement of the Ticket number assigned to their incident.**
Planning	The Service Requests Supervisor (assignee) will manually give the request the status of "Planning" when the request is ready for the entry of its estimated start and end dates, and the addition of any associated tasks.
Scheduled	The Supervisor will manually change the status to "Scheduled" once all planning has been completed and the request is ready for the first task Individual to begin their work. All associated tasks must be assigned before the request can be changed to "Scheduled".

Status Codes	Description
Work In Progress (WIP)	The Service Request will automatically be given the status of "WIP" once the first task has begun. If the request has no associated tasks, a user may give the request "WIP" status when work is ready to begin. The status of the ticket cannot be changed to "WIP" (or higher) unless the request has been assigned to a Supervisor.
Pending	The Supervisor will manually give the request the status of "Pending". The "Pending" status indicates that the request has been placed on hold. The Pending field (below the Status field) must be completed before the request can be saved in "Pending" status. Pending Options are: Parts, Requester Information, Approval, or Supervisor Action. When the request is removed from "Pending" status, the Pending field entry will automatically be cleared.
Resolved	The request will automatically be given a status of Resolved when the last associated task has been completed. If no tasks have been associated with the request, the Supervisor may move the request manually to the Resolved status when all work involved with it has been completed. Note: Change Tickets should be placed in Resolved rather than Closed. The ticket will automatically close on its own in three days.
Closed	The "Closed" status indicates that all work against the Service Request has been completed AND the completion has been confirmed with the Requester. Service Requests can be manually closed by the requests Supervisor+, or they may be automatically closed by Remedy, after the request has been in the status of Resolved for longer than 3 days. When a request is closed, a closure code must be placed in the Closure Code field. Closure code options are: Successful, Successful with Problems, Unsuccessful, Cancelled, or Automatically Closed. When closure codes of Successful with

Status Codes	Description
	Problems, Unsuccessful, or Cancelled are used, the requests Work Log should be updated explaining the situation.

STATUS ACTION

Once the Service Request has been saved for the first time, the Status field becomes a read-only field. To change the status of the request, you must use the Status Action field.

Status Action – Optional field that becomes required once the Service Request has been saved for the first time. The Status Action field controls the status transitions available to the user as the request moves through its lifecycle.

Valid status transitions are as follows:

Status Code	**Available Transitions**								
	New	Assigned	Planning	Scheduled	WIP	Pending	In Rollback	Resolved	Closed
New		X	X	X	X	X		X	X
Assigned			X	X	X	X		X	
Planning		X		X	X	X		X	
Scheduled		X	X		X	X		X	
WIP		X	X	X		X		X	
Pending		X	X	X	X			X	

Status Code	Available Transitions								
	New	Assigned	Planning	Scheduled	WIP	Pending	In Rollback	Resolved	Closed
Resolved		X	X	X	X	X			X
Closed									X

- Closure Code – Optional field that becomes required when the Service Request moves into a status of "Closed". Options are: Successful, Successful with Problems, Unsuccessful, Canceled, and Automatically Closed.
- Pending –Optional field that becomes required when the Service Request moves into a status of "Pending". Options are: Parts, Requester Information, Approval, and Supervisor Action.
- Approval Status – Not being used at this time.
- Sequence –Used for sequencing multiple Requests – Not being used at this time.
- Emergency – Not being used at this time.
- Health Status and Health Reason – Not being used at this time.
- Escalated – Optional **(Telecom- this field is used by manager approval only, and will then be assigned directly to an individual. Scrubbers will then follow up with the assigned individual rather than vendors for updates on the incident.)**

COMPLETING THE GENERAL TAB

The General tab contains details about the user that has requested the service. The majority of information displayed in this tab populates automatically from the entry of the requester's name in the Name*+ field. Automatically populated information must be verified to ensure that the ticket is routed to the correct group/location for resolution. If the automatically populated information is incorrect because the requester is visiting another location, or has temporarily changed locations, corrections should be made at the request level only. If the requester has permanently changed locations, an update of the requesters profile is required. Changing the requesters profile will be addressed later in this guide.

When the Service Request form is displayed in New mode, the following information is needed:

REQUESTER INFORMATION:

- Name*+ - Required – Enter the Requester's whole last name, or the first few letters of the last name and hit the Enter key. If the entered person has a Remedy Profile, information about them will automatically be added into the fields on the Requester Information tab. If more than one match is found, the system will display a list from which the user can choose the correct name.
  Note: For successful searching try using %name or name%, the % is a wildcard and will list all the names that end or begin with the name.

- Login*+ - Required – This field may be automatically completed from information obtained from the Requester's profile when the Name*+ field becomes populated.

- VIP – System Generated – Will be automatically populated by the System Administrator. This field is read only and cannot be changed.

- Phone – Optional – Verify the automatically populated information or manually enter the phone number, including extension.

- Requested Date+ - Optional - Use this field's associated menu to enter the date that the Service Request should be completed.
- Location - (The Profile must contain the address information for any people fields to be populated)the Location is a concatenated Field that is providing the address, City State and Zip for Print Case purposes.
- Office – Optional – This field identifies the office number to which the Requester is assigned. This field may be automatically completed from information in the Requester's profile. If the field does not automatically populate, you may enter the office information manually.
- Scope – System Generated - This field is not being used at this time.
- Region* – Required – Use this field to identify the Agency to which the Requester belongs. This field may be automatically completed from information obtained from the Requester's profile when the Name*+ field becomes populated. If the field does not automatically populate, or if the automatically populated information is incorrect, use the field's associated menu to locate and select the correct information. Do not manually enter text into this field. Although this field is optional, it is strongly suggested that every effort be made to ensure an entry is made here. The Region field is used for reporting and similar purposes, and is needed to make sure that ticket routing is handled correctly by Remedy.
- Site – Optional – Use this field to identify the Bureau, District, Region and Zone to which the Requester belongs. This field may be automatically completed from information in the Requester's profile. If the field does not automatically populate, the corresponding information must be selected from the field's associated menu. Do not manually enter text into this field.
- Department – Optional – Use this field to identify the department to which the Requester belongs. This field may be automatically completed from information in the Requester's profile. If the field does not automatically populate, the corresponding information must be selected from the field's associated menu. Do not manually enter text into this field.

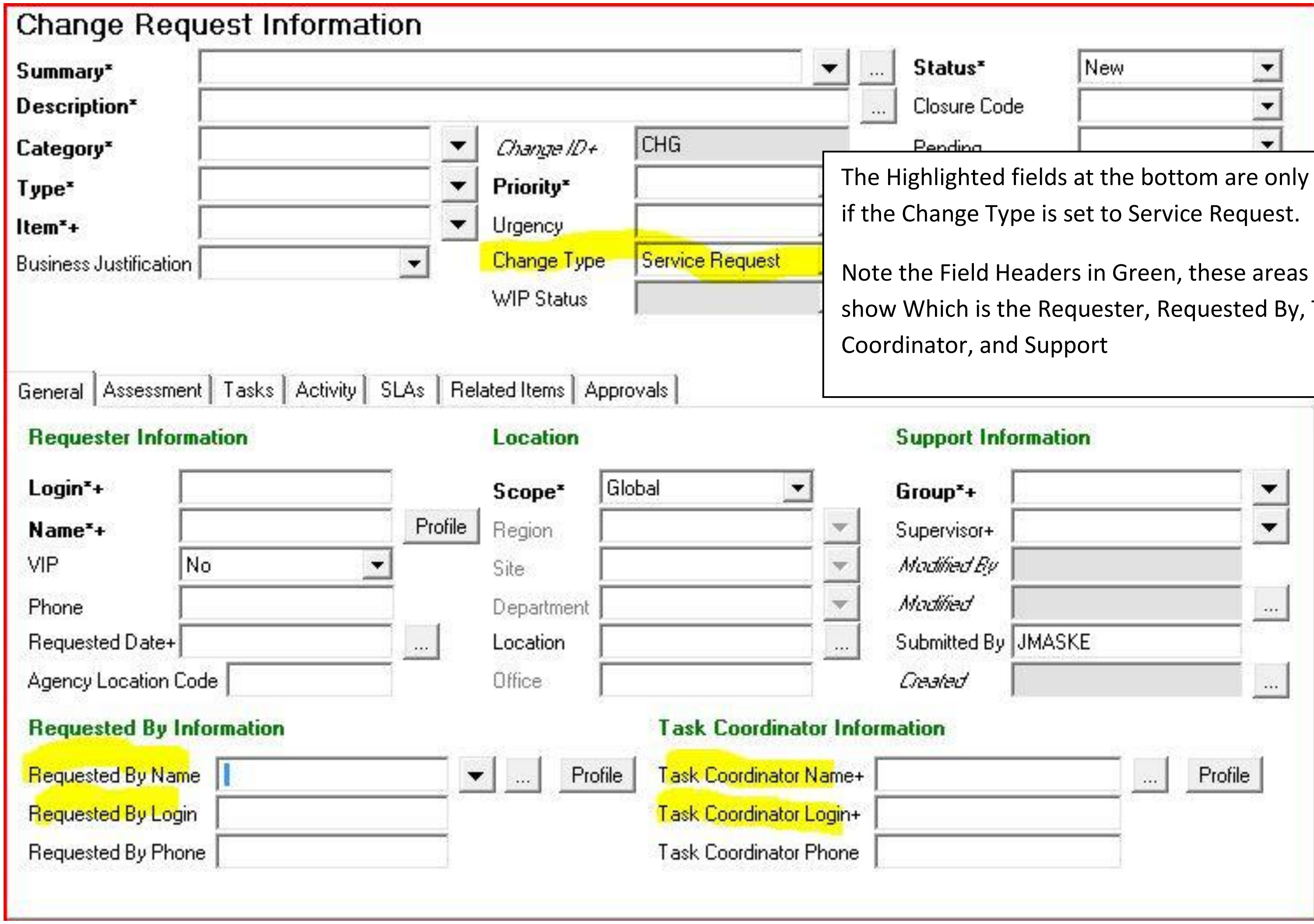
- Street, City, State, Postal Code – Required – This field identifies the physical work location of the Requester (Login+) of the service. Information will be auto-populated when the Login+ field is completed.

Support Information

- Group+ - Required - This field defines the group that will be assigned responsibility for the Service Request. After the request's CTI has been entered, the field's associated menu will be filled with the names of the group or groups that have been defined as having the skills needed to be assigned to the Service Request.
- Supervisor+ - Optional until the request is moved into a status of Planning. The Supervisor field defines the person that has been assigned the responsibility of making sure that the Service Request is successfully completed. In order to save a request in the status of Planning or higher, a Supervisor must be identified.
- Modified By – System Generated – Displays the login name of the user that made the last modification to the request.
- Modified – System Generated – Displays the date and time that the last modification was made to the request.
- Submitted By – System Generated – This field displays the login information on the person that created the Service Request.
- Created – Date and time of Ticket creation.
- Profile Button – Optional – Use this button to view additional information about the Requester, to access and update the Requester's profile, or to create a profile for a new user.

TASK COORDINATOR INFORMATION

- Task Coordinator Person+ – Enter the name of the person at the requester's Agency that should be contacted concerning the request.



The Highlighted fields at the bottom are only available if the Change Type is set to Service Request.

Note the Field Headers in Green, these areas will show Which is the Requester, Requested By, Task Coordinator, and Support

CREATING A USER PROFILE

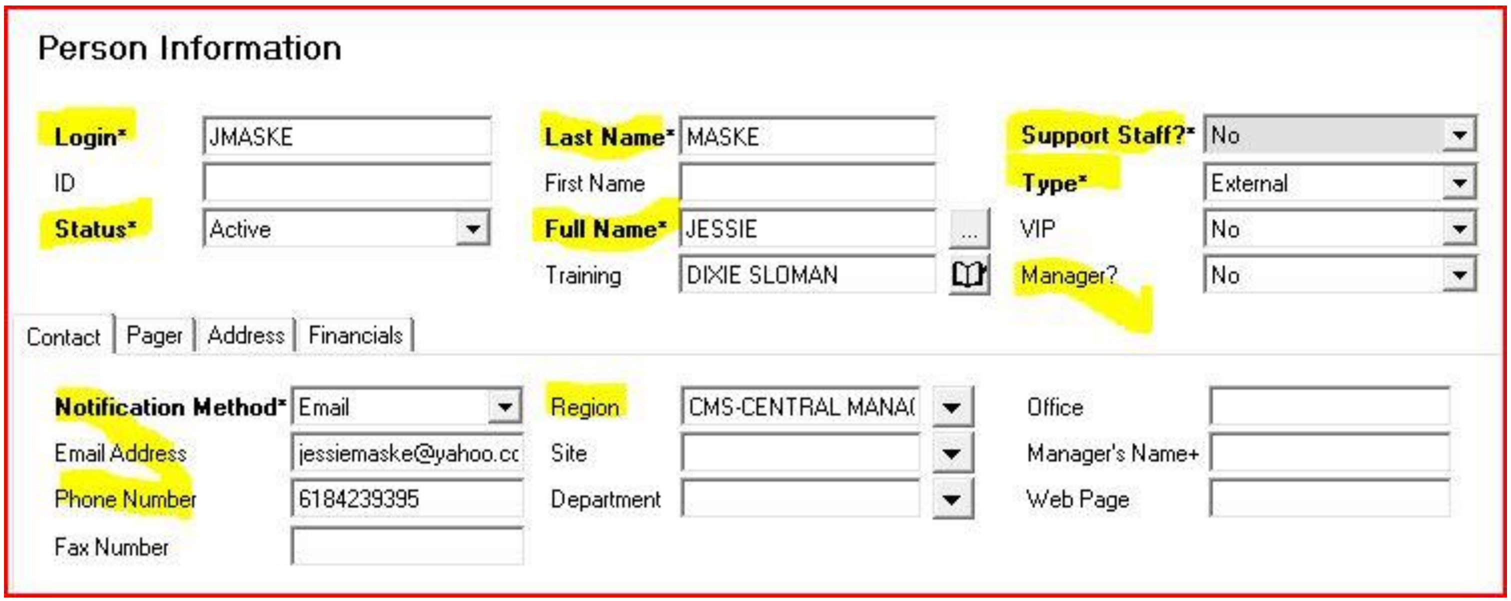
A User Profile is required for all INTERNAL State of Illinois employees and contractors. If a user profile does not exist for the person requiring the Service Request, one must be created before the request can be saved.

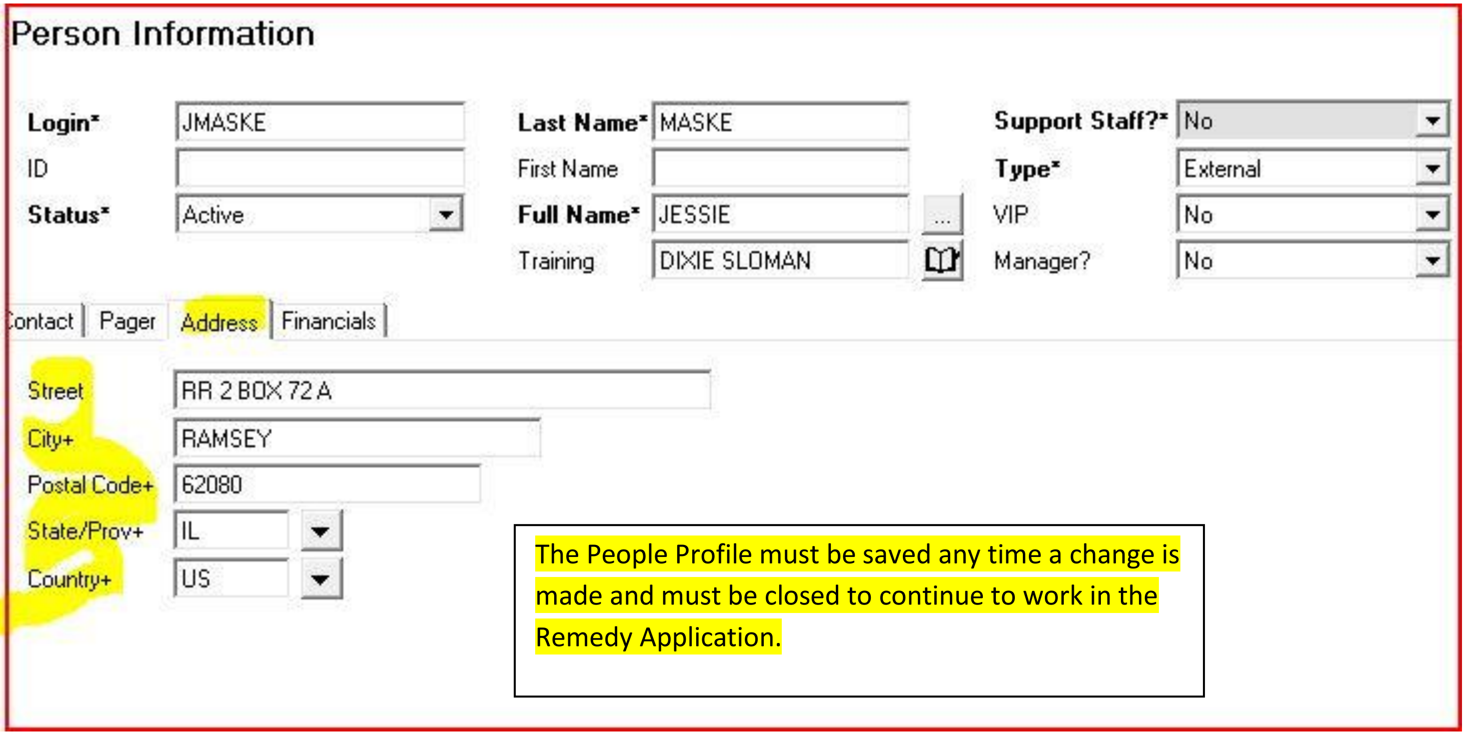
To create a new user profile:

1) From the General tab of the displayed Service Request, select the Profile button next to the Name*+ field. The Person Information form will display.
2) Complete the following required fields:
3) Login Name* - Enter the requester's first initial and last name. Entries must be in all capital letters. (There is a maximum amount of characters that may be used in the Login field, first initial last 7 characters of the last name, however, this may change due to a duplicate name.)
4) Status – Enter Active in this field if it has not already been populated.
5) Last Name* - Enter the requester's complete last name.
6) First Name – Enter the requester's first name (or the first name that they usually go by – i.e. William might be listed as Bill).
7) Full Name – Click your cursor into this field and the previously entered first and last name will automatically be posted into the field.
8) Support Staff? – Options are: Yes or No. Select "Yes" if the requester is a member of the IT staff. Select "No" for all other users.
9) Type* - Options are: Internal or External. Select "Internal" for all State of Illinois employees or contractors. Select "External" for all other users.
10) Manager? - Options are: Yes or No. Select "Yes" if the user is a manager or above. Select "No" for all other users.

11) Notification Method – Select Email from the available options. This is the only notification method used by the State of Illinois.

1) Email Address – Enter the user's email address.
2) Phone Number – Enter the user's phone number, including extension if applicable.
3) Region – Select the user's Agency designation from the field's associated menu. For external users, select the designation for the agency to which the caller's application belongs.
4) Address – In the fields displayed on the Address tab, enter the user's physical work location information (Street, City, State, etc).




Person Information
Login*
JMASKE
ID
Status*
Active
Last Name*
MASKE
First Name
Full Name*
JESSIE
Training
DIXIE SLOMAN
Support Staff?*
No
Type*
External
VIP
No
Manager?
No
Contact
Pager
Address
Financials
Street
RR 2 BOX 72 A
City+
RAMSEY
Postal Code+
62080
State/Prov+
IL
Country+
US
The People Profile must be saved any time a change is made and must be closed to continue to work in the Remedy Application.

ASSIGNING A SERVICE REQUEST

BUSINESS RULES ASSOCIATED WITH ASSIGNING A SERVICE REQUEST

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
2c	Receives new Service Request and reviews for accuracy / completeness.	N/A	Service Desk	• Monitors the Service Desk Email queue for new Service Requests. • Reviews new ESR Form Attachment data to ensure completeness and accuracy of information provided. • Consults with Requested By (when applicable).	• Service Desk is responsible for monitoring incoming Email for new requests in a timely manner. • Service Desk is responsible for the initial review and verification of details within the ESR Form Attachment(s) to ensure completeness and accuracy of information. • Service Desk is responsible to ensure proper Approval name is documented and confirmed within every ESR Form

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					Attachment and to reject / return the incomplete ESR Form Attachment to the Requested By when approver information is not provided or incorrect. • Service Desk is responsible to follow up with the Requested By to request additional data / information related to the accuracy or details necessary to create a new Service Request (when applicable).

When all required fields have been completed, the Service Request will be assigned for work. Assignment for most Service Requests will be done automatically through the use of skills based routing. Skills based routing has been set up to define one or more groups that have the skills to support the request. Because there may be more than one Group that has been configured with the appropriate skills, after selecting the Service Requests CTI, the creator of the request should review the system defined entries that are displayed in the Group+ field's associated menu. If there is more than one group listed on the menu, the request's creator should select the group that they feel is most appropriate to handle the request. If only one Group is listed, the creator may dismiss the menu and when the request is saved, the system will automatically post that group as the assigned group. All entries posted into this field must come from the field's associated menu.

If the ticket's creator feels that none of the system-defined assignment groups are correct, review the request and re asses the CTI, if CTI change is needed, do so, if after assessing the Ticket and the CTI are correct, before proceeding check with your supervisor. If by correcting the CTI you have the correct Group then reassign.

Supervisor+ - Optional until the Service Request is in a status of Planning – Information displayed in this Supervisor+ field's menu will define the names of the members of the group that has been selected in the Group+ field. From the field's associated menu, support technicians will locate their names and take ownership of the request. You cannot move the Service Request into the status of Planning without an entry in the Supervisor+ field.

NOTE: Business Rules on assigning to individuals should be a priority for all Supervisors. Supervisors should clarify these rules with their staff.

Service Requests should NOT be assigned directly to individuals. Those staff members that will be managing the Service Requests will be responsible for taking ownership of requests after they have been assigned to a group.

To select a Group+, highlight the group in the displayed list. The assigned group will be automatically populated into the Group+ field. However, the Supervisor+ field will remain blank.

To select a Supervisor+, highlight the individual in the displayed list. The assigned supervisor's name will populate the Supervisor+ field and their associated support group will be posted into the Group+ field.

SAVING A SERVICE REQUEST

Once all required fields are completed and the assignee group has been selected:

1) Click the Save button to save your request. A creation confirmation note will be displayed on the screen.
2) Dismiss the message, and the assignment confirmation message will display on the screen.
3) Dismiss the message and return to a new Service Request form.

BUSINESS RULE ASSOCIATED WITH ASSIGNING A NEW SERVICE REQUEST

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
3b	Assign the Service Request to the appropriate Shared Service team for support.	ASSIGNED	Service Desk	• Selects appropriate Category, Type, Item (CTI) and Region, Site, Department (RSD) based on customer location and the request type.	• Service Desk is responsible for selecting an appropriate "Summary" field drop-down entry related to the Service Request type (when applicable) which will automatically fill in the correct CTI data; otherwise a new

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				• Ensures the Assignment Group is correctly selected based on CTI and RSD. • Attaches the ESR Form Attachment to the Service Request; also attaches any other pertinent / supplemental documents related to the Service Request.	entry is to be typed into the "Summary" field and the correct CTI selections must be identified related to the Service Request type. • Service Desk is responsible for ensuring the correct RSD is filled in related to the Requester's location where the work is to be done. • Service Desk is responsible for ensuring that the correct Shared Service team is selected within the "Group" field of the Service Request to ensure proper routing of the request.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					• Service Desk is responsible for Saving the Request. The Status will change from "New" to "Assigned", and then the request will be routed directly to the Shared Service team for assignment.

TAKING OWNERSHIP OF A SERVICE REQUEST

One responsibility for change supervisors is accepting the Change Requests assigned to them.

The change supervisor is notified of Change Request assignments by email, pager, or Remedy Alert. Assigned Change Requests can also be listed in the Assigned Requests table in the console by using the Console View field.

Change Requests are assigned automatically on creation by the Remedy Change Management application. The assignment is based on the Change Request's categorization. They can be assigned manually or automatically after a change to the Category, Type, or Item fields.

During configuration, the application administrator determines to whom the Change Requests are assigned. This decision is based on criteria such as the Change Request's category, type, or item, and its location. For example, all Change Requests that are categorized as hardware issues might be assigned to the Support-Hardware group. All Change Requests that are categorized as software upgrades and originate from California might be assigned to Sonya Software in San Francisco. The criteria of the Change Request together with the application administrator's configuration determines to whom each change is assigned.

The change supervisor must make sure that the assignment is correct and accept the Change Request. If the assignment is not correct, the change supervisor can reassign the request.

The majority of Service Requests will NOT initially be assigned directly to an individual. Technicians (Supervisors) will be responsible for taking ownership of requests after they have been assigned to a group.

TO TAKE OWNERSHIP OF A SERVICE REQUEST:

1) From the IT Service Management Console, review the Assigned Requests table to locate requests that belong to the group but currently are not assigned to an individual.
2) To easily locate unassigned requests, click on the Assigned To column header in the Assigned Requests table. The items that have no assignees will be moved to the top of the list of requests.
3) The Assigned Requests table DOES NOT refresh automatically. Users should use the Refresh button at the bottom of the table to make sure that the displayed data is the most current list of available requests.
4) Double click on the request that you want to open or highlight the request in the table and click the View button. The selected request will display in modify mode.
5) In the Supervisor+ field, click the field's associated menu to see a list of members of the assigned Group+.
6) From the displayed list, select the person that will be assigned as the Supervisor of the request. The selected name will automatically populate the Supervisor+ field.
7) Click the Save button at the bottom of the form to save your assignment. Once the request has been saved, the assignee will receive an email notifying him/her of the assignment.

THE ROLE OF SUPERVISOR+

The person that is assigned as the Service Request's Supervisor+ will be responsible for the successful completion of the Service Request. This does not necessarily mean that they will perform the work to complete the request, but rather that they will be responsible for managing the request until its completion.

The assigned Supervisor+ will retain ownership of the request throughout its lifecycle. As the "owner" of the request it will be their responsibility to plan the request, including determining the start and end dates, and the assessment of any risks associated with the request. Additionally, the Supervisor+ will be responsible for adding and assigning any tasks that are required to complete the request. As work on the request progresses, the assigned Supervisor+ will receive numerous notifications and information so that they can remain apprised of the activities being performed on the request.

MANAGING THE SERVICE REQUEST

Once the Supervisor+ has been assigned, they may begin the planning and assessment of the request. The components of a Service Request that will be used for this purpose are the:

- Assessment Tab
- Tasks Tab
- Activity Tab
- Related Items Tab

STATUS TRANSITION

The Status field defines the position of the request as it moves through its lifecycle. To begin planning and assessment of the request, the Supervisor+ must change the request's Status field to "Planning".

To change the status of a Service Request, click the Status field's associated menu and select "Planning".

Click the Save button to save your modification.

ASSESSMENT TAB

The Assessment tab allows the Supervisor+ to provide planning and assessment information on the Service Request.

To complete the fields on the Assessment tab, the following information must be given:

PLANNED TIME:

- Planned Start Date – Required – Enter the date that work on the request is scheduled to start.
- Planned End Date – Required – Enter the date that the request is scheduled for completion.
- Planned Person Hours – System Generated – Displays the total number of hours that will be required to complete the request.
- Week Button – Optional – Select the week button to define the duration of the request. When this button is selected it will automatically calculate one week from the defined "Planned Start Date". If no start date has been entered, the system will display a date that is one week from the current day and time.
- Month Button – Optional – Select the month button to define the duration of the request. When this button is selected it will automatically calculate one month from the defined "Planned Start Date". If no start date has been entered, the system will display a date that is one month from the current day and time.

ACTUAL TIME:

- Start Date – System Generated – Displays the date and time that the request was given the status of "Work In Progress".
- End Date – System Generated – Displays the date and time that the request was given the status of "Resolved".
- Person Hours – System Generated – Displays the total number of hours that it has taken to move the request from the status of "Work In Progress" to the status of "Resolved".

- Estimated Downtime (min) – Not being used at this time.
- Actual Downtime (min) – Not being used at this time.

ATTACHMENTS

Attachments Table – Required –Must include the electronic ESR Form. May include documents that define information concerning the request's Project Plan, Contingency Plan and/or Test or Back out plans or instructions relating to the request. Attachments placed here become "embedded" into the database table for the associated request. If the attachment is opened and changes are made, the changed document does NOT automatically become re-embedded into the request. To re-embed the changed document, it must be added as a new attachment. Up to 5 attachments are allowed in this table. Individual attachments may not exceed 10mb in size.

RISK ASSESSMENT (NOT USED AT PRESENT TIME)

Business Risk – Optional – Enter the degree of risk this request will have on the business activities of the organization. Risk is defined on a scale of 1-10, with 1 being the lowest risk and 10 being the highest risk.

Technical Risk – Optional - Enter the degree of risk this request will have on the technology of the organization. Risk is defined on a scale of 1-10, with 1 being the lowest risk and 10 being the highest risk.

Comments – Optional - Enter information that will provide assistance in defining the scope of the business or technical risks of this request.

Plans – Optional - Enter information on the activities that will be performed in order to complete this request.

ESTIMATED NUMBER OF USERS IMPACTED

- By Location – Not being used at this time.
- By Assets – Not being used at this time.
- Impact – Not being used at this time.

Agency Tracking Number –Agencies may continue to utilize existing systems to internally create and monitor requested services or tasks. When an Agency existing system is being used, this field should contain the ID or tracking number assigned to this service or task from that system. (When appropriate the Agency Tracking number will be listed on the ESR form)

TASKS TAB

A “Task” is defined as a sub-set of activities needed to successfully complete a Service Request. Depending on the type of Service Request being done, the associated tasks may require implementation from different business groups in different areas.

The Tasks tab allows the Supervisor+ to define tasks that are required to complete the request. Tasks associated with a Service Request can be pulled in from a predefined tasks list and/or entered manually (ad-hoc tasks).

Tasks are treated as individual tickets, and will have their own assigned ID numbers, time frames, and task Individual groups and individuals.

The Supervisor+ of the Service Request will use the Tasks tab to monitor the progress of the tasks. Additionally, as each task progresses through its lifecycle, the Supervisor+ will receive notifications and information about the status of the tasks.

In order to add tasks to the Service Request, the Service Request must be given the status of “Planning” and saved. To change a request’s status to “Planning” – From the Status Action field, select “Planning” and click the Save button at the bottom of the Service Request form.

SEQUENCING TASKS

Within Remedy ITSM, tasks may be handled as individual undertakings, or they may be sequenced so that they occur in succession.

Sequencing for tasks can be enforced (i.e. the secondary tasks cannot be seen until the first group of tasks has been completed); or Remedy ITSM can be set up to provide the Individuals of the secondary tasks with a warning message to remind them that the first group of tasks has not yet been completed. The decision to enforce or warn Individuals of the sequencing (dependency) of the tasks can be made at the time that the tasks are added to the Service Request.

ADDING A PREDEFINED TASK

On the Tasks tab, click the Select Predefined Tasks button. The Predefined Tasks For Change dialog will display.

In the Predefined Tasks For Change dialog, select the predefined task group that you want to use for this Service Request from the Show Predefined Tasks For field menu. A list of pre-structured tasks will display in the Tasks table.

Use the Add Selected Task button, or Add All Tasks button to select your required tasks. The selected tasks will populate the Task For Change Request table.

ADDING AN AD-HOC TASK

On the Tasks tab, click the Create New Tasks button. The Tasks Template (Change Task Information) will display.

An ad-hoc Task will inherit information from the Service Request (Requester Information, Location information, Urgency, Priority, Region and Related Items). This information should be CAREFULLY REVIEWED by the creator of the task. All default information can be changed as required.

Complete the Change Task Information and click the Save button to save you new task. Once it is saved, refresh the Tasks table on the Service Request and the new task will display.

ACTIVITY TAB

The Activity Tab provides the details and history of the work done on the Service Request. The information required in this tab should be completed before the request is Resolved.
Work Log – Optional – Enter information to describe the work that has been performed on the request. Information entered here cannot be deleted once the request has been saved in new or modify mode.

This field will become required when the request has been given a status of “Work In Progress”.

If Tasks have been associated with the Service Request, information from the Tasks Work Log can be viewed in the SR’s Work Log.

Information in the Work Log should be concise and should clearly define the actions that were taken to resolve the Service Request. This information is valuable to other technicians that may need to continue work on the request, or to those that must follow up when a customer is not satisfied with the request’s resolution. Entries like “Done”, “Fixed”, “CBM (cured by magic)”, “I went to the Requester’s desk and fixed it” or “The Requester didn’t know what they were talking about”, are not appropriate entries for this field. REMEMBER: The Work Log is a diary field – which means that the information that is entered into the field will be automatically posted with the date and time the entry was made, and the name of the person who made the entry.

Note: Prior to setting the Status to Resolved the Technician must confirm with the customer that the Request has been resolved. This information must be typed in the Work Log field.

Audit – System Generated – The Audit field contains information on changes that have been made to the request. For example, changes in the assignee or the assigned to group, status transitions or changes to the categorization of the ticket will be recorded. Information that is posted into this field will be automatically posted with the date and time the entry was made, and the name of the person who made the entry. Once the information has been saved, it cannot be deleted.

Time Spent Resolving Change Request – The fields in this area are not being used at this time.

Other Activities – The fields in this area are not being used at this time.

RELATED ITEMS TAB

The Related Items tab allows the Supervisor+ to link assets to the Service Request.

TO COMPLETE THE FIELDS ON THE RELATED ITEMS TAB:

CURRENT RELATIONSHIPS

- Show - Optional – Use this field to narrow down the list of linked items that displays in the Show Table. Options are: All Related Items, Related Assets, Related Components to Related Services, Related Change Requests, Depending Change Requests to Dependant Change Requests, Related Help Desk Cases.
- Show Table – Optional – Displays information on requests, cases or assets that have already been linked to this request.
- Refresh Button – Use this button to refresh the information displayed in the Show Table.
- View Button – Use this button to display and view the details of a related item. The selected record will be displayed in a “read-only” view and cannot be changed.
- Remove Relationship Button – Use this button to remove the link between the current request and an item displayed in the Show Table.
- View Differences Button – Not being used at this time.

CREATE NEW RELATED RECORD

- Record Type – Service – Use this field to define the type of record to create. Options are: Asset Record, Change Request, or Help Desk Case. Records created from this location will automatically be linked to the Service Request.

- Record Type – Asset – Options are: Asset Record, Change Request, Help Desk Case, or Service.

- Dependent CR (Change Request)- Optional – When Change Request is selected in the Record Type field, the Dependent field will become enabled. Use this field to identify the Change Request you are look for as being a “dependent” Change Request. Options are: Yes and Clear.

- Create Button – Optional – Select the appropriate entry from the pull-down menu and select the Create button. Options are: Change Request or Help Desk Case. The applicable form will be displayed. Enter all required information and save the new record. The new record will automatically be linked to the current request.

SEARCHING FOR EXISTING RECORD TO RELATE

- Record Type – Optional – Use this field to define the type of record that you want to search for. Options are: Asset Records, Change Requests, Help Desk Cases, and Services.

- Search Button – Optional – Select this button to begin the search for your existing record. A Search Criteria form will display. In the Search Criteria form, define the qualifications for your search and click the Search button. A list of results will display. Searching for Asset Records will be covered later in this guide.

WORKING WITH ASSET RECORDS (THIS WILL BE USED IN PC LEASE)

If the asset involved in the Service Request is one of the newly leased Desktop PCs, Monitors, or Laptops, all leased items should be linked to their respective Service Requests.

LOCATING AN EXISTING ASSET RECORD TO LINK TO A SERVICE REQUEST

1) Go to the Service Request's Related Items tab – under the Search for Existing Record to Relate area:
2) From the Record Type field menu, select Asset Record.
3) Click the Search button. The Search Criteria dialog form will display.
4) From the Search Criteria dialog, select the Advanced tab. The Advanced tab will display.
5) In the Advanced tab, build your search qualification using one or more of the displayed fields.

Example 1:

1) In the Category field, use the menu and select Hardware.
2) In the Type field, use the menu and select Desktop.
3) In the Item field, use the menu and select Professional.
4) Click the Search button to start your search. The Search Results table will be filled with the results of your search.

Example 2:

1) In the Tag Number field, manually enter the tag number of the unit that you are trying to relate.

2) Click the Search button to start your search. The Search Results table will display the record(s) that match your qualification.

TO RELATE AN ASSET TO YOUR SERVICE REQUEST:

1) In the Search Results table, highlight the asset that you need to relate.
2) Click the Relate button. A confirmation message will display.
3) Click OK to dismiss the message and you will be returned to the Search Criteria form.
4) Click Close to close the Search Criteria form and you will be returned to the Service Request.

   The asset that you selected will now appear in the Related Items table.

CREATING A NEW ASSET RECORD TO LINK TO A SERVICE REQUEST

1) Go to the Service Request's Related Items tab – under the Create New Related Record area:
2) From the Record Type field menu, select Asset Record.
3) Click the Create button. The Asset Information form will display.
4) On the Asset Information form, complete the following fields:

Header	**Description**
Category*	Select the appropriate entry from the pull-down menu.
Type*	Select the appropriate entry from the pull-down menu.
Item*	Select the appropriate entry from the pull-down menu.

Status*	Select "Deployed" from the pull-down menu.
Region*	Select "CMS – Central Management Services" from the pull-down menu.

GENERAL TAB

Reference Numbers Section

Tag Number	Enter the assets assigned CMS asset tag number. Example: C41689
Serial Number	Enter the unit's serial number as provided on the vendor's packing list. Example: 000-9-190-8506
Part Number	Enter the vendor's part number for the asset. Example: RA127US#ABA
Model Number	Enter the vendor's model number for the asset. Example: DC7600
Lifecycle Section	
Received Date	The date that the product arrived at the IGOR warehouse. Example: 06/01/06
Source Section	
Ownership Type	Select "Lease" from the pull-down menu.
Mfg Name+	Manually enter name of vendor that supplied the product. For example: Enter Hew and hit the Enter key on your keyboard. Hewlett Packard Company will automatically populate the field.

Financials Tab	
Shipment No.	Manually enter the BOA PO Number on which the product was leased. Example: CPC6172810 / PRV17845

On the Asset Information form, click the Save button at the bottom left of the form.

The Asset ID*+ field will automatically be populated with the asset's official Remedy asset identification number.

COMPLETING THE ASSET RECORD

On the Asset Information form, review the Asset ID*+ field and verify that an Asset ID has been automatically assigned to your asset record.

On the Asset Information form, add the following information:

PEOPLE TAB

1) Click the Add button on the bottom left of the Users, Owners and Managers table. The Select Type dialog form will appear.
2) Select Type Dialog.
3) Select “Group” from the Type field’s pull-down menu and click the OK button. The Select Existing Group dialog form will display.
4) Select Existing Group Dialog.
5) From the list of groups select: “CMS Desktop Management” and click the OK button. The Select Role dialog form will display.
6) Select Role Dialog.
7) Select “Asset Manager” from the Role field’s pull-down menu and click the OK button. A confirmation message will display. Dismiss the message and you will be returned to the People tab.
8) On the People tab verify that the CMS Desktop Management Group is displayed in the table.
9) On the Asset Information form, click the Save button on the bottom left of the form to save your modifications.
10) A confirmation message will display.
11) Dismiss the confirmation message and you will be returned to the Service Request’s Related Items tab.
12) Click the Refresh button to refresh the Related Items table.

    The asset you just created will be displayed in the table.

CREATE A RELATED ASSET RECORD (CONFIGURATION ITEM)

REFER TO EUC

Use Case Name:	Create a Related Asset Record (Configuration Item)
Description:	This event is for Configuration Managers who require the ability to create an Asset Record (CI) while working with a Change Request.
Actors:	Configuration Manager (Asset Management) or Change Supervisor (with Configuration Management responsibilities)
Status:	Current

FREQUENCY

This use case would be invoked when a Configuration Manager requires a Configuration Item to be associated to a Change Request, and the Configuration Item doesn't exist within the Configuration Management Database (CMDB).

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.

- The user has Configuration Management permissions and responsibilities.
- The Configuration Item (CI) does not exist within the CMDB.

POST CONDITIONS

- A Configuration Item record is created within the correct CMDB Class.
- The Configuration Item (CI) is associated to a Change Request.

ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has a valid login and password for the Remedy Asset Management application.
- The user has the correct permissions to create/modify a Change Request and an Asset Management / CMDB record.

FORM NOTES

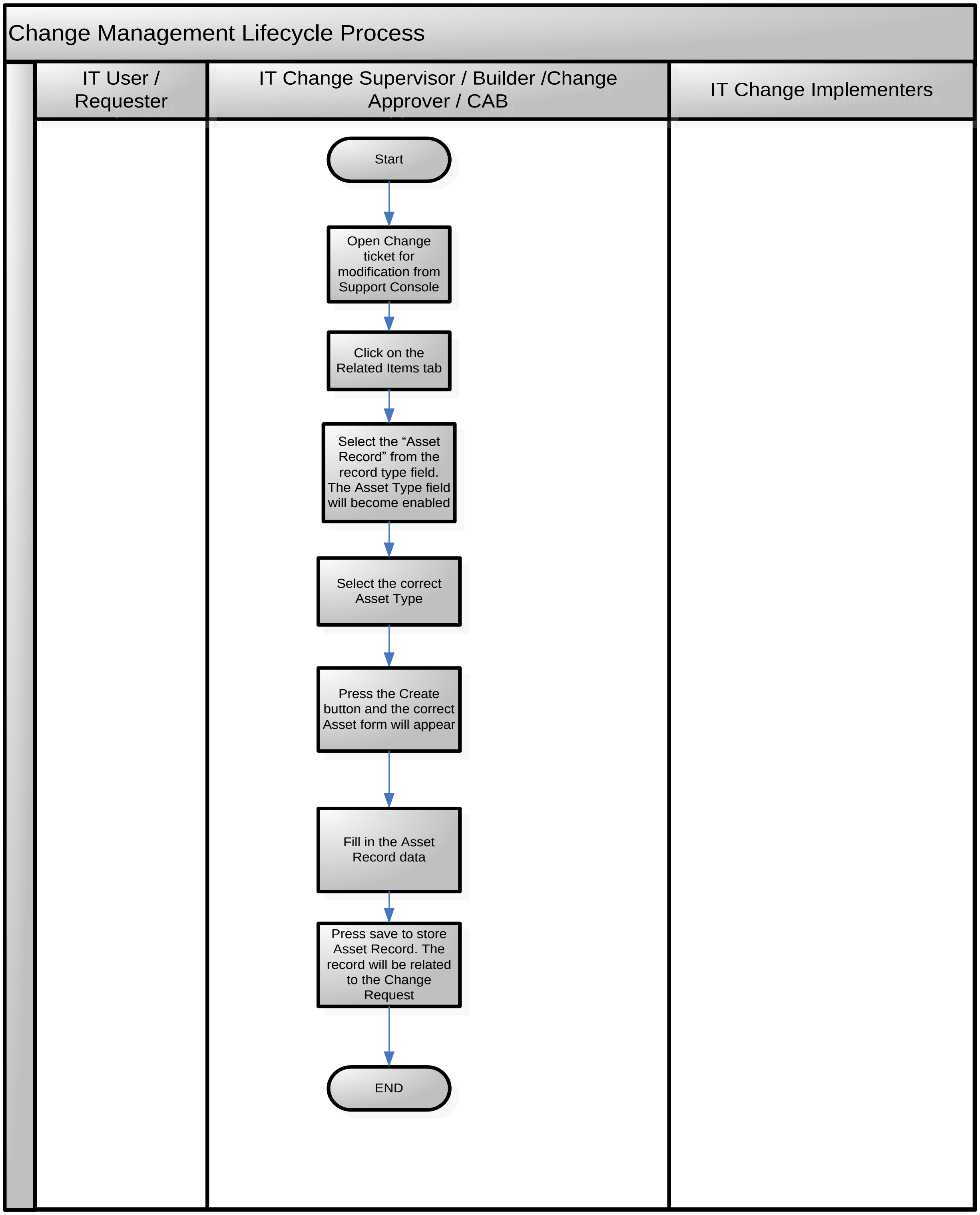
Configuration Management Database (CMDB)

The CMDB is divided into multiple classes (i.e. Computer Systems, Processors, etc.) with specific attributes for each class. Control of the CMDB should be limited to the Configuration Management team.

BASIC COURSE OF ACTION

1) From the Support Console, the Change Supervisor (with Configuration Management responsibilities) opens a Change Request.
2) The user clicks the Related Items tab.
3) Within the Related Items tab, the user selects the value “Asset Record” from the Record Type field. Once selected the supporting field Asset Type is enabled.
4) Select the desired asset type (i.e. System – Computer System) from the Asset Type field.
5) Click the Create button (in the lower-right corner of the tab) and the asset form corresponding to the type you selected is displayed.
6) The user fills in the appropriate fields within the Asset record and presses save when the record is completed.
7) A message confirms that the new asset record you created has been related to the existing Change Request.

USE CASE PROCESS DIAGRAM



UN-RELATE AN ASSOCIATED ASSET

Use Case Name:	Un-relate an Associated Asset
Description:	This event is for Change Supervisors who need to remove an associated asset from a Change Request.
Actors:	Change Supervisor
Status:	Current

FREQUENCY

This use case would be invoked when a Change Supervisor needs to remove an associated asset from a Change Request.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The user has Change Supervisor permissions and responsibilities.
- A Change Request has an associated asset record.

POST CONDITIONS

- The associated asset record is removed from the Change Request.

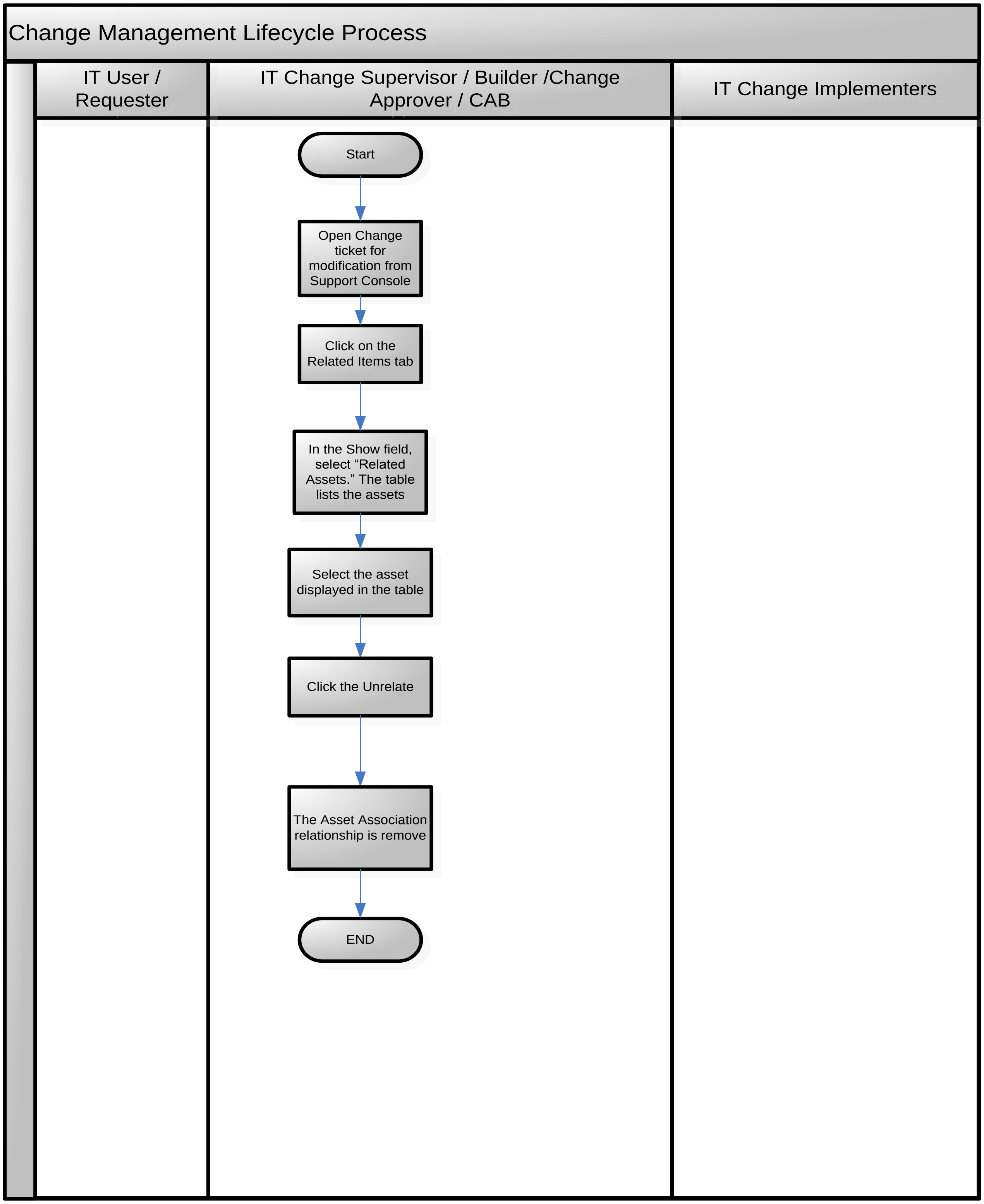
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct permissions to create/modify a Change Request.
- An asset is associated to the Change Request.

BASIC COURSE OF ACTION

1) From the Support Console, open a Change Request.
2) Click the Related Items tab.
3) In the Show field, select “Related Assets” from the list. The table lists all the related assets.
4) The user selects the asset record that needs to be removed from the association.
5) The user clicks Remove Relationship.
6) A confirmation message appears to confirm the relationship removal.
7) If the user clicks yes, the asset is removed from the association.

USE CASE PROCESS DIAGRAM



CREATE A NEW CHANGE REQUEST

Use Case Name:	Create a New Change Request
Description:	The creation of a new Change Request through the use of an ESR. The request will be manually assigned to the group with the correct skills by the Service Desk personnel or by the IT support person.
Actors:	Requested By – Person initiating the request. Requested For Task Coordinator End User Service Desk agent IT Support Staff
Status:	Current

FREQUENCY

This use case is to be invoked every time a new Change Request needs to be manually created by a Service Desk agent for an end user or by an IT support person.

PRECONDITIONS

- The user is logged into the client user or web tool.
- The user is at the Support Console form in Remedy.

POST CONDITIONS

- The Change Request information is submitted into the Remedy Change Management application and a change record is created. The change record is assigned to the correct group with the skill set needed to supervise the change.

ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- Assignment information is stored in the SHR:Assignment form and is based upon the Category, Type, Item, Region, Site and Department provided for the Change Request categorization.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to create a new Change Request.
- The user has the correct permissions to create a new Change Request.
- The user has their personal preference set to “Open Selection Dialog” to select whether to create a Help Desk Case or Change Request record.

- The end user has their ‘Tool Options Confirmation’ set (checked) to “Confirm After Creating a New Request”.
- The Change Management Setting for ‘Action on Change Submit’ is set to “Modify Individual”. (This is set by the System or Application Administrator).

FORM NOTES

CHANGE REQUEST INFORMATION FORM

Required fields: Summary, Description, Category, Type, Item, Login (ID), Name, Group, Priority

Optional field: Requested Date

Select a value for field: Priority, (impact on agency) Urgency (as seen by Customers perspective)

Verify Default field values: Status, Scope

New value added to Change Type: Service Request

New fields exposed when Change Type is Service Request: Requested By Name, Requested By Login, Requested By Phone Number, Requested By Profile button, Task Coordinator Name, Task Coordinator Login, Task Coordinator Phone Number, Task Coordinator Profile button and Agency Property Control Location Code

New fields: Location Address, Agency Tracking Number

BASIC COURSE OF ACTION

1) From the Remedy Support Console, or the Management Console, click on the Create Request link. This will open a dialog window where the end user will select the form they wish to enter – Help Desk Case or Change Request.
2) Click on Change Request.
3) Make a selection from the Summary* menu (Proceed to Step 8) OR enter information into the field manually (Proceed to Step 4).
4) Enter a description of the request in the Description* field (if it is different than the Summary* information).
5) Make a selection from the Category* menu.
6) Make a selection from the Type* menu.
7) Make a selection from the Item* menu.
8) Select from the Business Justification menu the reason for this request. This field is optional and is not required when submitting the request.
9) The end user will continue to populate additional information at the top of the screen for the Priority and Urgency fields.
10) Select a value from the Change Type field (Change, Project, Release, or Service Request).
11) If Change Type is "Service Request", additional fields are revealed and should be populated as necessary.
12) The end user will now collect information about the requester. Enter the login ID of the requester in the Login field. After entering the data, press Enter to have the system search the employee records within Remedy to return additional data to the record: Name, Phone, VIP, Location information (Region, Site, and Department). If a match is not found, a Search People dialog window will appear. Enter information in the fields at the top of the window; then click on the Search button. In the search results list, highlight the entry/row of the individual and then click on the OK button. The dialog window will be closed and the information from the highlighted record will be passed to the Change Request.

13) If not using the Login field, the end user may enter data into the Name*+ field. Pressing the Enter key will search the employee records within Remedy and if an exact match is found, the fields mentioned in the last Step are populated. Otherwise, the dialog window to search people is displayed. Follow the same procedures for that window as described in that Step. *(tips: use the %name or name% to locate name)*

Note: Verify the Profile, Every time a ticket is created

14) Requested Date — Optional- Manually enter the date (Example: 04/28/2006 01:00:00 PM) or click on the button immediately to the right of the field which then opens a calendar to be used to select the correct date and time. This date is when the requester requires the Change Request to be completed.
15) The end user must select a group to assign the request to by selecting from the menu attached to the Group*+ field.
16) Add the Requested By information at the bottom of the form, information is taken from the Electronic ESR form, copy and paste.
17) The end user may now save the request by clicking the Save button in the lower left corner of the screen.
18) When you save the Change Request, several things happen:
19) A Change Request ID will be populated (format "CHG000000000074"). The Change Request ID is the record's unique identifier.
20) Status will default to "Assigned".
21) Approval Status will default to "Not Required" unless rules have been established to require an approval. If an approval is required, "Approval Required" will display.
22) The Modified By, Submitted By, Modified, and Created fields are filled in by the system and cannot be changed.
23) A message appears indicating to which group the Change Request has been assigned, and will show the group the Change Request is assigned to. This assignment is determined by the categorization of the Change Request.

24) A message appears indicating the Change Request ID.

An email notification is sent to the Change Management group.

An email notification is sent to the Requested By, Requested For, and Task Coordinator containing:

Change Request ID

Agency Tracking number (if applicable)

Summary

Description

Status

Requested By

Requester

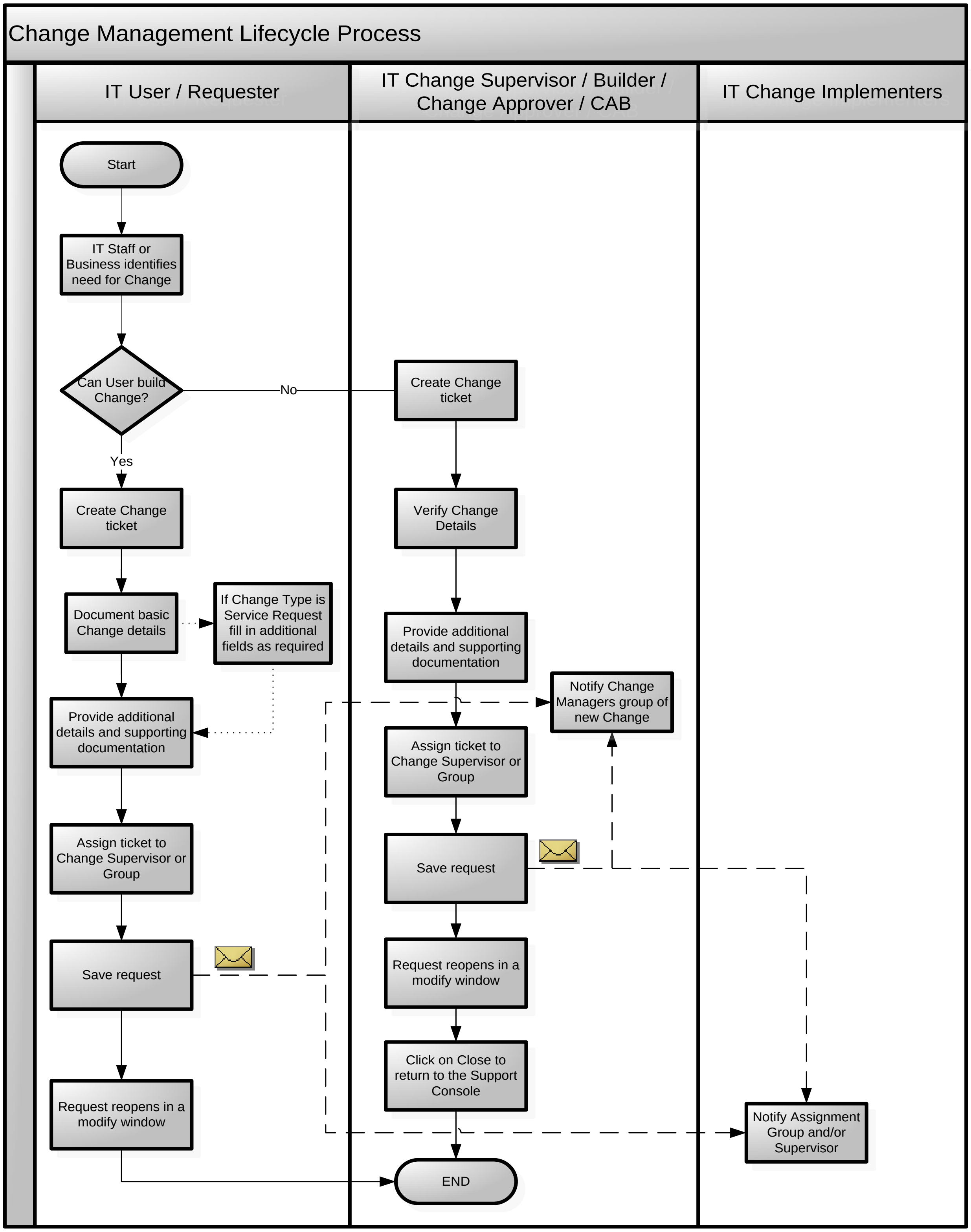
Creation Date/Time

Assigned Group

25) The request is then reopened in a Modify window.

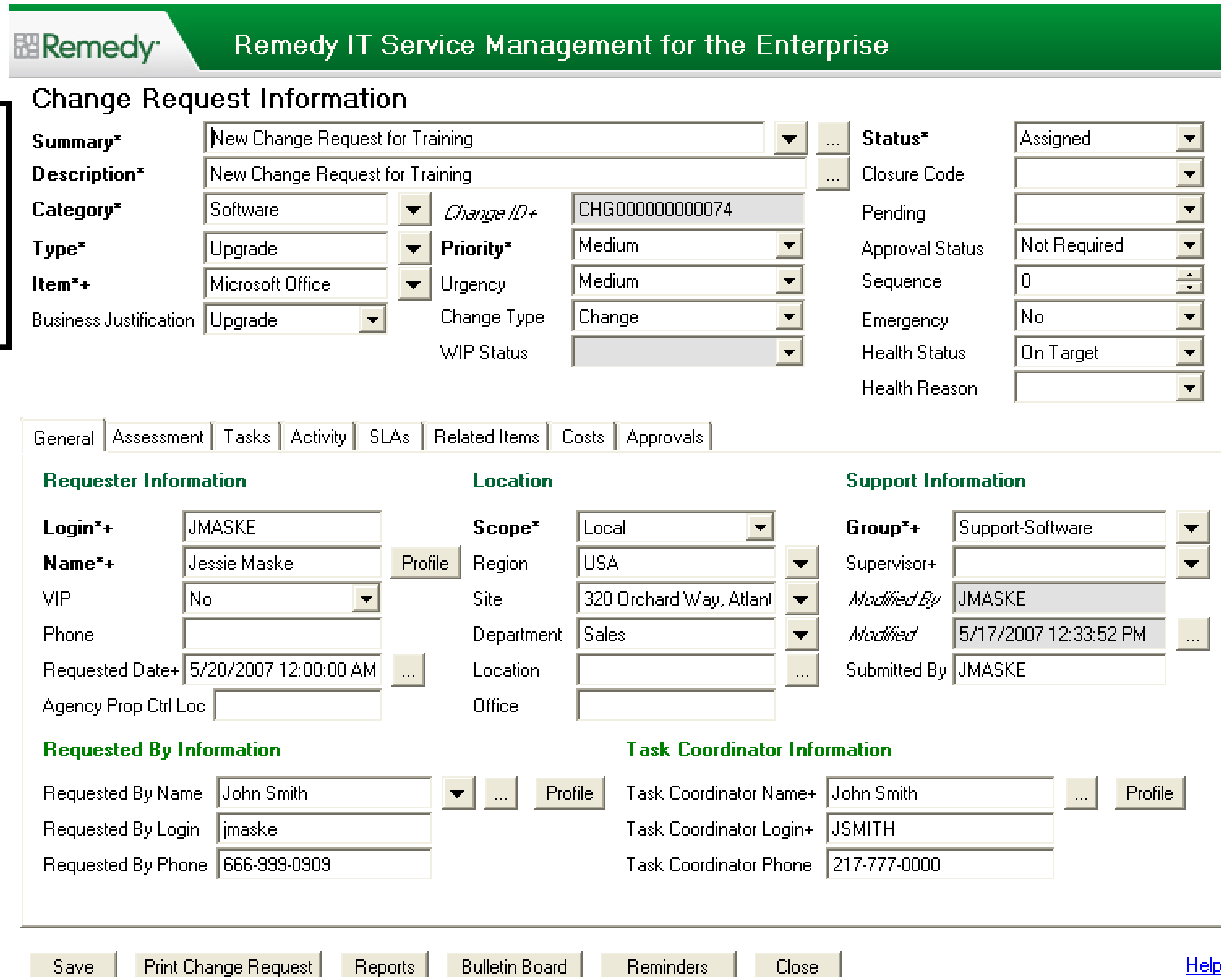
26) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



Header information / General Tab have been filled in.

Change Request has been saved. Notice sent to Group



BUSINESS RULE ASSOCIATED WITH ACCEPTING THE ASSIGNMENT OF A REQUEST:

The Service desk creates a new Service Request in the Remedy system based on data provided by the customer in the ESR Form Attachment details. The Service Request is then assigned to the appropriate Shared Service support team.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
3c	Receive a new Service Request in the Shared Service team Assignment queue.	ASSIGNED	Shared Service team	• Monitors all appropriate assignment queues for incoming / new Service Requests and reviews highest priority requests first and foremost. • Reviews new Service Request details to ensure the request has been properly routed to the correct	• Shared Service manager (or appointed delegate) is responsible for actively monitoring their designated Assignment queues for New Service Requests routed to them (supported during normal M-F business hours), and for expediting highest priority requests in the queue first and foremost. • Shared Service manager (or appointed delegate) is responsible for reviewing the

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				assignment group. • Routes tickets improperly assigned to their support team to the appropriate assignment group, or may consult with the Service Desk for assistance.	Service Request details in a timely manner to ensure the request is in the proper assignment group queue or for identifying the correct assignment group or consulting with the Service Desk for assistance. • Shared Service manager is responsible for following up with Service Desk to request clarification or additional details related to the Service Request (as needed).
3d	Provide a Cost Analysis to the Requested By for the Service Request (as needed).	ASSIGNED	Shared Service team	• Reviews the ESR Form Attachment and identifies whether the Requested By has	• Shared Service manager (or appointed delegate) is responsible for reviewing all information specified in the

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				made an inquiry for a Cost Analysis. • Provides a Cost Analysis detail to the Requested By and updates information in the work-log (as needed).	ESR Form Attachment(s) and for identifying any Cost Analysis inquiry to be completed prior to beginning work on the Service Request. • Note: The Cost analysis needs to be listed as part of the Description and in the Work Log • Shared Service manager (or appointed delegate) is responsible for providing the Cost Analysis to the Requested By in a timely manner and for documenting details of the completed inquiry in the work-log of the Service Request.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					• *Note: It is important to document details of Cost Analysis inquiry in the work-log to provide information that may result in a decision to Cancel the request.*

ACCEPT A CHANGE REQUEST ASSIGNMENT

Use Case Name:	Accept a Change Request Assignment
Description:	The acceptance of a Change Request assignment by an individual.
Actors:	Change Supervisor
Status:	Current

FREQUENCY

This use case is to be invoked every time a Change Request is assigned to a group and the individual needs to assume responsibility of the request.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The request has been properly categorized.

- The request has been created and is assigned to a group.

POST CONDITIONS

- The request's assigned individual has been determined.
- Status is changed to "Planning".

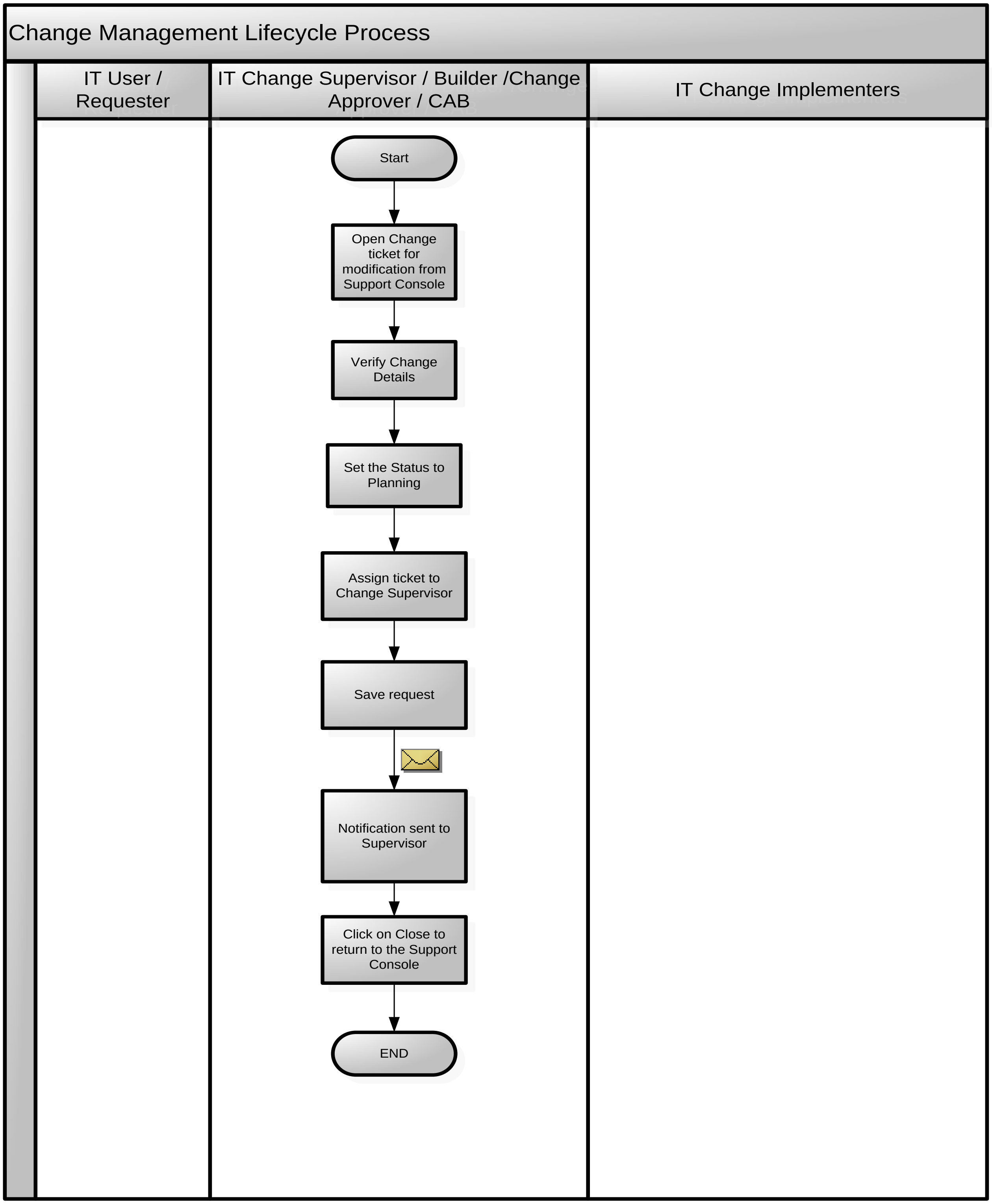
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to modify a request.
- The user has the correct permissions to modify a request.

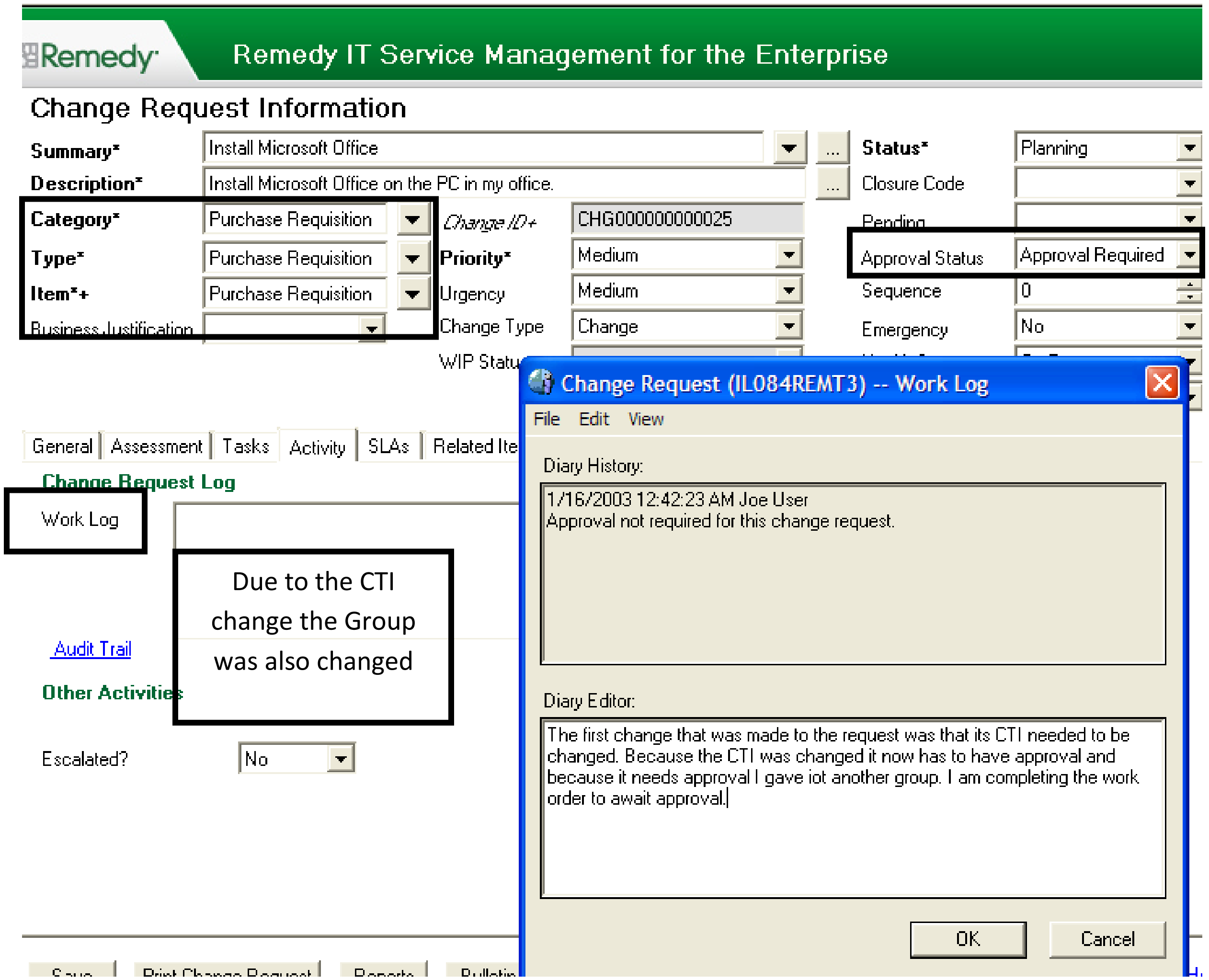
BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in user's support group.
2) From the Remedy IT Service Management Support Console, double click on the request in the assigned table. This will open the Change Request form window with the Change Request information populated.
3) Click on the status field and change the status to "Planning".
4) Click on the Supervisor+ field and select yourself or assign to another individual.
5) Review the change summary and description to verify the appropriate values for Category, Type, and Item have been chosen.
6) Click the Save button.
7) The request's Supervisor+ field is changed in the database.
8) An email/page is sent to the assigned individual to alert them that an existing Change Request was assigned to them.
9) If the user determines that the request is assigned to the wrong group, Change the CTI as needed to choose the correct Group and *See Reassignment of a Change Request*.
10) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



THE REASSIGNMENT OF CHANGE REQUEST



THE REASSIGNMENT OF A CHANGE REQUEST

Prior to re-assigning a Change Request See Business Rules below.

BUSINESS RULE 3 C

- Service Desk is responsible for ensuring the correct Shared Service team is selected within the "Assignment Group" field of the Service Request to ensure proper routing of the request.
- Service Desk is responsible for Saving the request to ensure the request will be routed directly to the Shared Service team for assignment.
- Shared Service manager (or appointed delegate) is responsible for actively monitoring their designated Assignment queues for New Service Requests routed to them (supported during normal M-F business hours), and for expediting highest priority requests in the queue first and foremost.
- Shared Service manager (or appointed delegate) is responsible for reviewing the Service Request details in a timely manner to ensure the request is in the proper assignment group queue or for identifying the correct assignment group or consulting with the Service Desk for assistance.
- Shared Service manager is responsible for following up with Service Desk to request clarification or additional details related to the Service Request (as needed). DO NOT re-assign back to the Service Desk!!

FREQUENCY

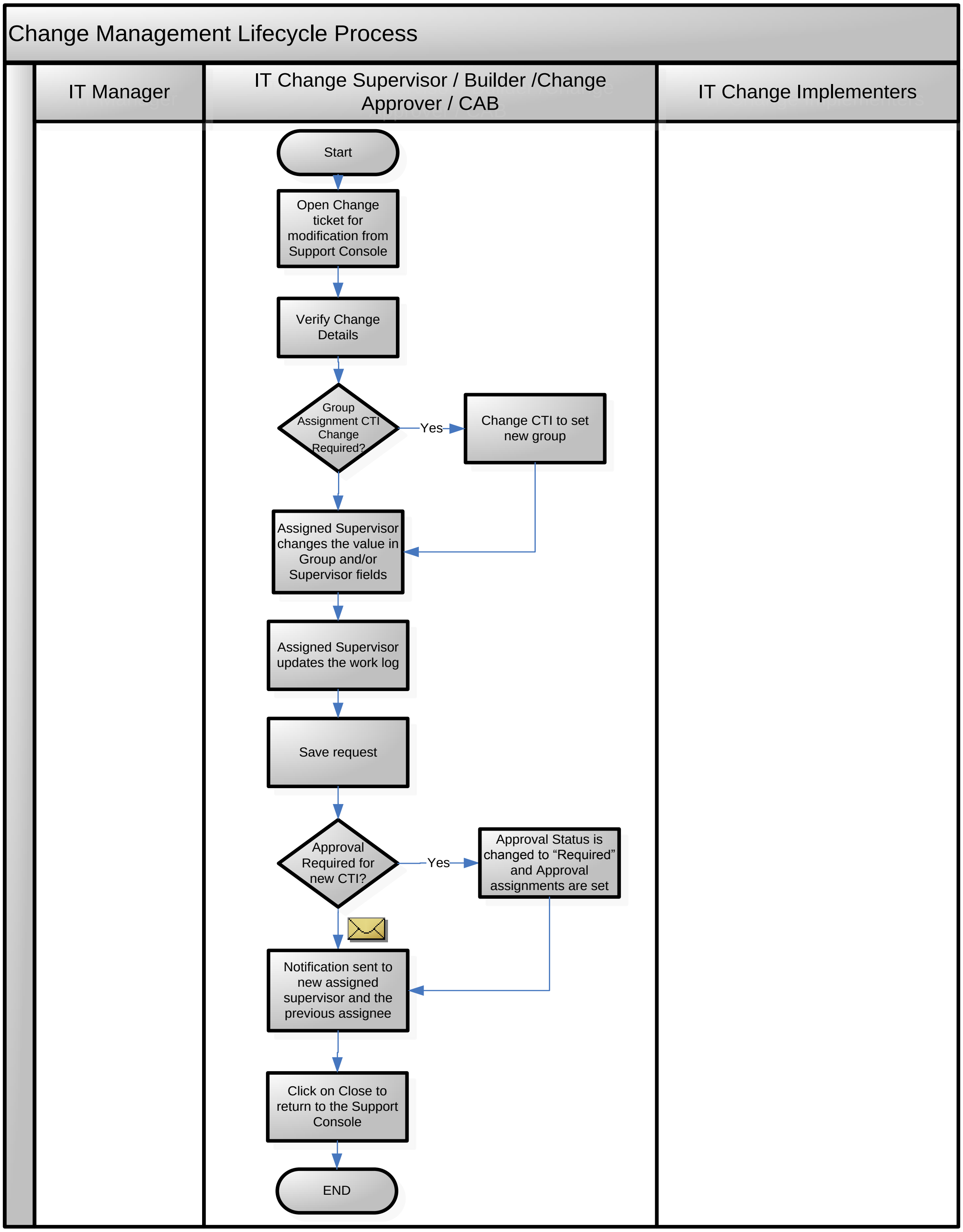
This use case is to be invoked every time a Change Request is assigned to a group and the individual needs to reassign the request to another group.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console and Support Console will display all Change Requests and Change Tasks assigned to the logged in user's support group.
2) From the Remedy IT Service Management Support Console, double click on the request in the assigned table. This will open the Change Request form window with the Change Request information populated.
3) If the reassignment involves a group, the Change Supervisor will click on the Group menu to select another group.
4) In some cases, a change to the existing Category, Type, and Item (CTI) maybe required to set the new group.
5) The Change Supervisor changes the Category, Type, and Item fields and then selects the new group (based on the new CTI combination).
6) If the reassignment involves the supervisor, the Change Supervisor will click on the Supervisor menu to select another individual to supervise the request.
7) The Change Supervisor will click on the Activity tab.
8) The supervisor will provide additional information in the Work Log. Click on the diary button next to the Work Log field. The user will enter the appropriate information and then click OK.
9) The user will then click the Save button.
10) If the CTI was changed to accommodate a new group assignment, then an approval assignment may be required for the new CTI. If approvals are required then the Approval Status is changed to "Approval Required" and the Approval assignments are established.
11) To return to the Support Console screen, click on the Close button of the Change Request form.

12) An email/page is sent to the original assigned group or supervisor to alert them that an existing Change Request was reassigned to another group or supervisor.
13) An email/page is sent to the new assigned group or supervisor to alert them that an existing Change Request was reassigned to that group or supervisor.

USE CASE PROCESS DIAGRAM



ADDING TASKS TO A CHANGE REQUEST

Use Case Name:	Adding tasks to a Change Request
Description:	The end user will be adding tasks to an open Change Request.
Actors:	Change Supervisor
Status:	Current

Business Rules 5a and 5b apply when Adding and Assigning Tasks down to the Technician level (Status = "Scheduled").

Description: Addition of pre-defined or new tasks, sequencing the order in which the tasks are to be completed (concurrently or dependent), and assigning a specific Technician to complete each task. Change status of request to "Scheduled" when all tasks are added, assigned to a technician, and sequenced properly.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
5a	Add pre-defined or new Tasks to the	PLANNING	Shared Service team	• Identifies all work related tasks necessary	• Shared Service manager (or appointed delegate) is

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
	Service Request and, if necessary, sequence the order in which tasks may be completed.			to complete the Service Request details. • Determines order in which work tasks must be sequenced (concurrent or dependent upon a task). • Identifies the technician responsible for completing each specific work task. • Includes Tasks and related Attachments to accommodate up to and no more than 10	responsible for adding tasks for any Service Request containing work tasks that are to be completed by more than one technician within their specific team, or containing work tasks that may be dependent upon additional / other shared service teams (required). • Shared Service manager (or appointed delegate) is responsible for selecting tasks from available pre-defined task lists or manually adding in any new tasks specific to the work necessary to

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				Asset moves per one Service Request. • ***<u>Note:</u>*** *It is a recommended best practice to group by location (RSD) or by deployment date (planned start / end) for Service Requests that are used for up to 10 Asset related moves within one request.*	complete the Service Request. • Shared Service manager (or appointed delegate) is responsible for making a determination of how work tasks are to be ordered / sequenced. Concurrent work tasks may share the same sequence number; dependent work tasks must be numbered higher than tasks that must be completed first. Sequencing tasks is only necessary when applicable. • Shared Service Team is responsible for allowing up to – 10 Asset moves to be

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					assigned and tracked within one Service Request, and to include specific details on all Assets in the Attachment section (required). •
5b	Assign a specific technician to each Task that has been added into the Service Request.	PLANNING	Shared Service team	• Identifies a technician to carry out the completion of a work task associated with the Service Request. • Updates the work-log with additional notes / instructions for the technician to follow. • Ensures a final task at	• Shared Service manager (or appointed delegate) is responsible for assigning task level work to a specific technician and for providing any additional data in the attachments or work-log. • Shared Service manager (or appointed delegate) is responsible for adding a pre-

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				the end of every Service Request is added to review and verify completion of the request with the customer. •	defined final task to ensure a QA follow up and review of the completion and quality of work with the customer (either the Requested By or Task Coordinator) in every single request (required). •
5c	Change the status of the Service Request to "Scheduled" to initiate the start of work task activities for assigned technicians.	SCHEDULED	Shared Service team	• Updates the work-log with a new entry and saves the Service Request with a status of "Scheduled".	• Shared Service manager (or appointed delegate) is responsible for changing the status of any Service Request with assigned tasks to "Scheduled" when work is ready to begin on the request. • ***Note:*** *Auto-notification of the*

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					technician of assigned tasks will not commence until the request is moved into "Scheduled" status.

FREQUENCY

This use case is to be invoked each time a Change Request requires the adding of a task.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The request has been created and is assigned to a support group.

POST CONDITIONS

- The Change Task information is submitted from the Change Request form. The Change Task record is auto assigned to the correct group with the skill set needed to complete the Change Task.

ASSUMPTIONS

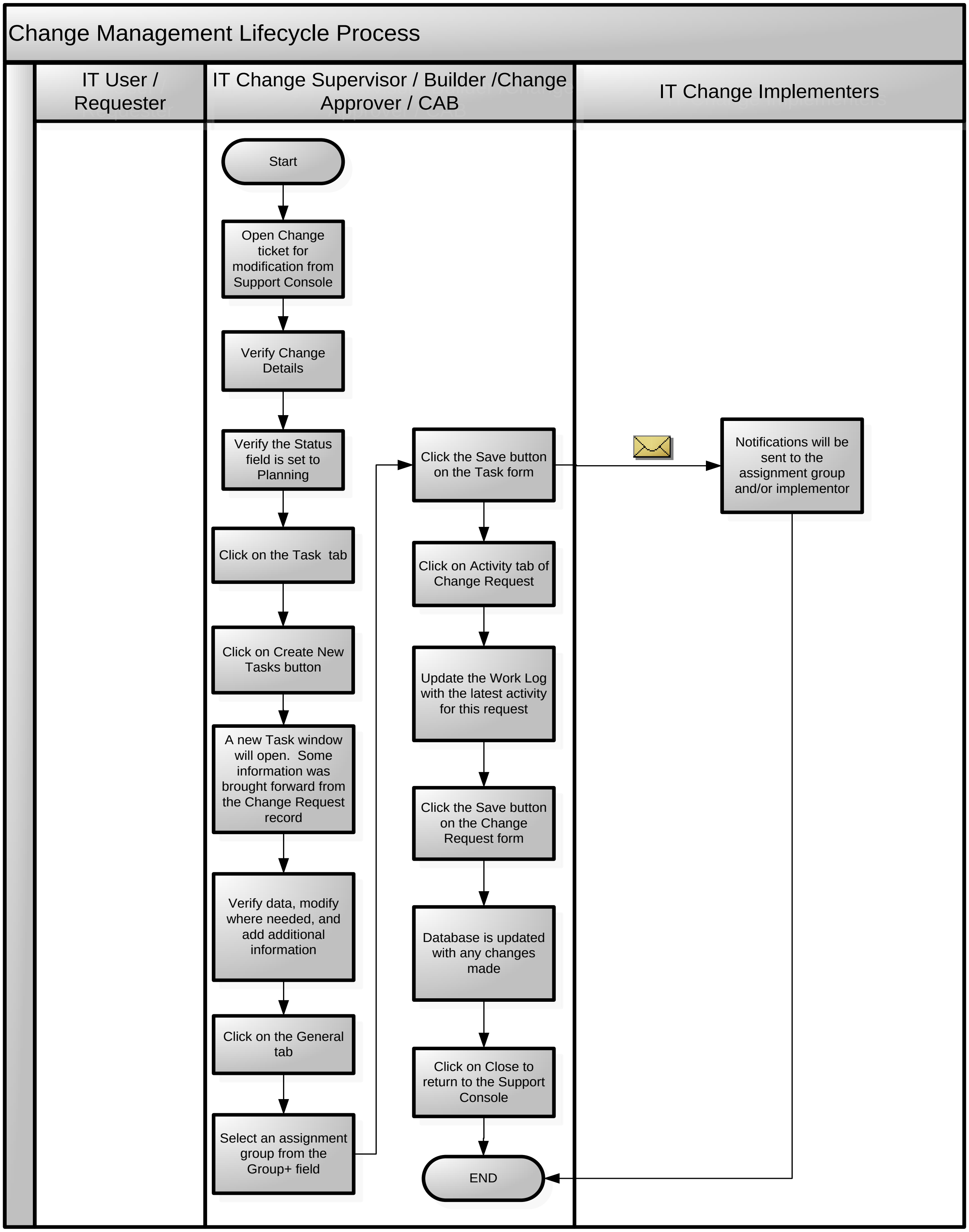
- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to modify a request.
- The user has the correct permissions to modify a request.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all problems, Change Requests, and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the Change Request in the assigned table. This will open the Change Request information form window with the Change Request information populated.
3) Verify that the Status field is set to "Planning".
4) Click on the Assessment tab.
5) Verify that the Planned Start and End Date fields in the Assessment tab are filled in with the planned dates.
6) Click on the Tasks tab.
7) Click on the Create New Tasks button. This will open the Change Task Information form.
8) Click in the Summary field and type in the summary for this task.
9) Click in the Description field and type in the detailed description of the task.
10) The Category information will populate from the Change Request. Choose a category from the Category field drop down, if necessary, to more precisely define the Change Task. This will populate the Category field.
11) The Type information will populate from the Change Request. Choose a type from the Type menu, if necessary, to more precisely define the Change Task. This will populate the Type field.
12) The Item information will populate from the Change Request. Choose an item from the Item menu, if necessary, to more precisely define the Change Task. This will populate the Item field.
13) The Priority field and Urgency fields will be populated with the priority and urgency values from the Change Request. Choose a priority from the Priority menu, if necessary, to more precisely define the Change Task. This will populate the Priority field.

14) The requester information will populate with the information from the Change Request.
15) The location information will populate with the information from the Change Request. Choose a different Region, Site, and Department, if necessary, to more precisely define the Change Task.
16) Click on the menu attached to the Group+ field to select the proper assignment group.
17) Click on the Assessment tab.
18) The planned start date and planned end date fields will populate with information from the Change Request. Choose a different Planned Start Date and Planned End Date, if necessary, to more precisely define the Change Task.
19) Click on the Task Info tab.
20) Click on the Save button.
21) The Change Task screen closes and returns the Change Request information.
22) (Optional) Click on the Activity tab.
23) (Optional) Update the Work Log with recent activity performed on the request.
24) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



SELECTING PREDEFINED TASKS

Use Case Name:	Selecting Predefined Tasks
Description:	The planning and scheduling of a Change Request by adding predefined tasks.
Actors:	Change Supervisor
Status:	Current

BUSINESS RULES 5A, 5B, AND 5C ASSOCIATED WITH ADDING AND ASSIGNING TASKS ARE ALSO APPLIED TO PREDEFINED TASKS

FREQUENCY

This use case is to be invoked every time predefined tasks need to be added to a Change Request.

Key or lead people may have predefined task needs.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.

Post conditions

- Task records have been added to the Change Request.
- Each Task has a Status of "New".
- No notifications have occurred at the Task level at this time. Notifications are not delivered until the Status of the Task is "Scheduled".

Assumptions

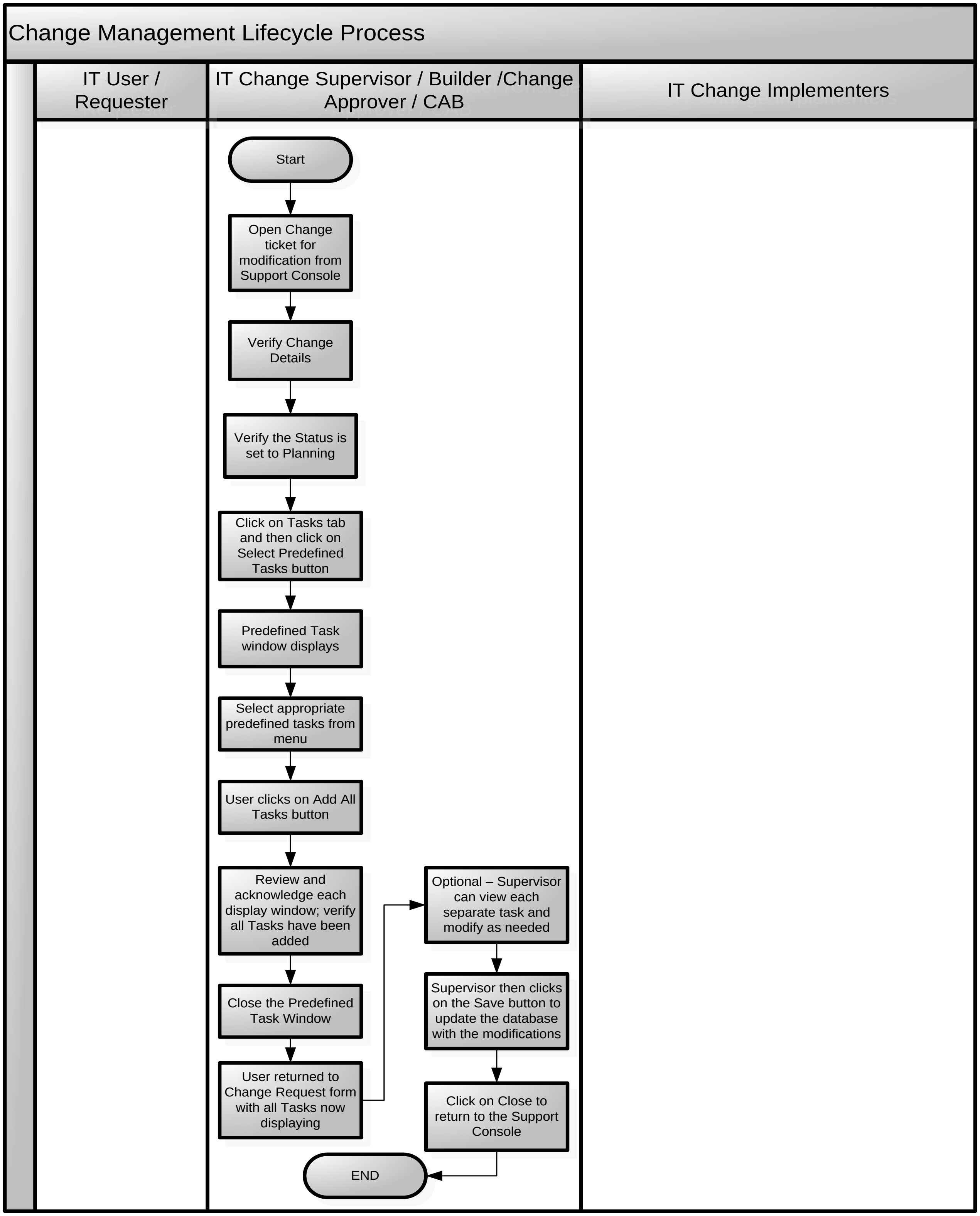
- Person Information is stored in the SHR:People form in the Remedy Application.
- Assignment information is stored in the SHR:Assignment form and is based upon the Category, Type, Item, Region, Site and Department provided for the Change Request categorization.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to update a Change Request.
- The user has the correct permissions to update a Change Request.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the request in the assigned table. This will open the Change Request form window with the Change Request information fields populated.
3) Verify that the Status field is set to "Planning".
4) Click on the Assessment tab.
5) Verify that the Planned Start Date and End Date fields in the Assessment tab are filled in with the planned dates.
6) Click the Tasks tab.
7) Click Select Predefined Tasks.
8) The Predefined Task window appears.
9) Select the appropriate set of predefined tasks from the Show Predefined Tasks For menu.
10) After the appropriate set of predefined tasks is selected, click the Add all Tasks button. At this time, the list tasks are automatically created and a window appears indicating that all tasks have been added to the Change Request. Click OK to clear this message.
    Note: Ad-hoc Tasks may be added as well as Pre-defined by Clicking on Create New Tasks.
11) A warning message is then displayed indicating the option to change the task sequencing and update the planned start and end dates for each task. Click OK to clear this message.
12) Click the Close button to close the Predefined Task window.
13) You are returned to the Change Request and the Tasks for this Change Request table are refreshed to show the predefined tasks that were created.

14) (Optional) At this time the user can open each individual task by highlighting the task and clicking the View button, and then update the Planned Start and Planned End times or add additional notes on the Activity tab of the Task. Save and close the task record when done.
15) Click the Save button on the Change Request to save your changes.
16) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



ACCEPTING TASK ASSIGNMENTS

Use Case Name:	Accepting Task Assignment
Description:	Viewing task and taking ownership.
Actors:	Task Individual
Status:	Current

BUSINESS RULES 6A, 6B, AND 6C, IN ASSOCIATION WITH COMPLETING TASK WORK ASSIGNMENTS

Description: Task assignments are being worked on by the technician and the Service Request status will remain as "Work In Progress" until the last task is completed. Service Requests with no Tasks associated may skip the "Scheduled" status and move directly to "Work In Progress" (Status = "Work In Progress").

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
6a	Technician will receive a notification message from	WORK IN PROGRESS	Shared Service Technician	• Reviews the Remedy console for new /	• Shared Service Technician is responsible for proactively

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
	Remedy to begin work on their assigned Task(s) and will change Task status to "Work In Progress" while attending to the completion of work tasks. *Note: The overall request status of the Service Request will automatically be given "Work In Progress" status when the first Task scheduled is changed to "Work In Progress".*			assigned Task work, and / or reviews incoming Email notification to check Remedy console for new / assigned Task work. • Reviews Service Request details in the Remedy fields and within the ESR Form Attachment. • Identifies all work tasks to be completed, updates work-log and changes status of Service Request to	checking the Remedy system for any new Tasks that have been assigned. Do not rely solely on Email notification from Remedy of new Tasks that have been assigned. • Note: Always check the Console and view assigned tickets • Technician must always review all data within the Remedy Service Request prior to working on a new task. • Shared Service Technician is responsible for performing a detailed review of all Service

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				"Work In Progress". • Consults and works with agency Task Coordinator to verify or confirm details of the Service Request.	Request data in the Remedy ticket and should not solely rely on an Email notification to begin task work activities. Work-log entries are required to complete tasks before the Service Request can be saved. • Shared Service Technician is responsible for changing the status of the Service Request to "Work In Progress" before the work activity is to be performed and should not delay this activity until after the work activity is completed. • Shared Service Technician is

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					responsible for consulting with the Task Coordinator in requesting additional details related to the Service Request (when applicable).
6b	Technician completes a specific task (or multiple concurrent tasks) and changes status of Task from "Work In Progress" to "Closed". If multiple tasks are sequenced, the first task completed will trigger the next sequenced task in line to begin.	WORK IN PROGRESS	Shared Service Technician	• Updates the work-log and changes Task status to "Closed" when each task of the triggered sequence of work tasks is completed.	• Shared Service Technician is responsible for ensuring that assigned Task work is accurately performed and completed in a timely manner. • Shared Service Technician is responsible for updating the work-log and ensuring that the Task status is "Closed" upon completion of work activity, to allow a smooth

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					transition of successor Tasks.
6c	Shared Service manager may assign a request to be completed by one technician based on a single work activity with no related Tasks to be added or Scheduled. Technician can change the request status to "Work In Progress" to perform Task-less work activities.	WORK IN PROGRESS	Shared Service Manager	• Consults with a single technician to perform all work activities in the Service Request without adding and assigning Tasks. • Changes status of the Service Request from "Planning" to "Work In Progress" and may bypass the "Scheduled" status (when applicable).	• Shared Service manager (or appointed delegate) is responsible for updating the work-log and for providing specific work activity information for a single Technician to complete. • Shared Service manager (or appointed delegate) is responsible for consulting directly with the Technician before changing the status of the request to "Work In Progress", due to lack of auto notification and triggering

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					status.

FREQUENCY

This use case is to be invoked every time a user needs to take ownership of a Change Task.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The task Status is "Scheduled".

POST CONDITIONS

- Task Status is "Work In Progress".
- Task is assigned to an individual.

ASSUMPTIONS

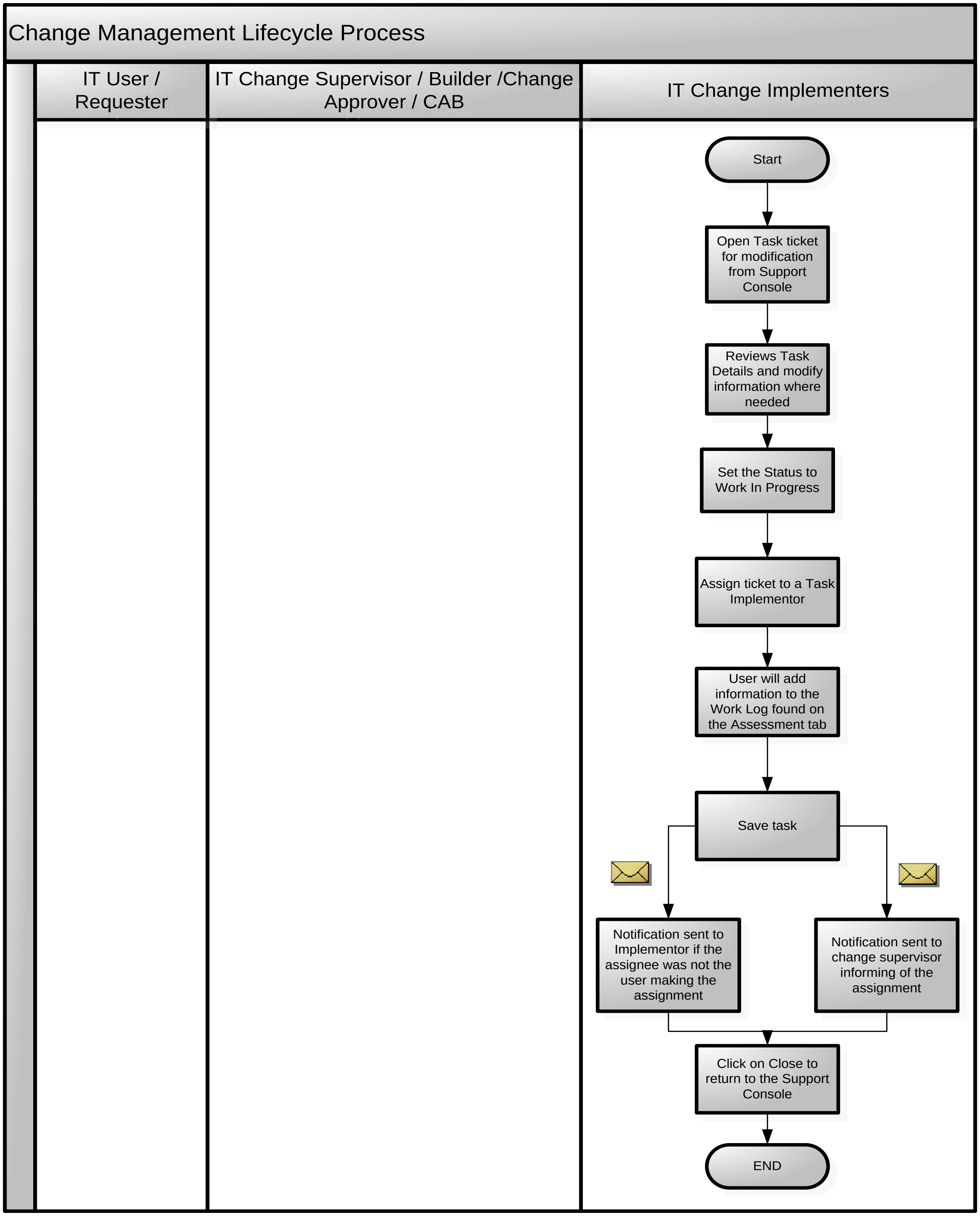
- There is a data form in Remedy with an individual's information.

- There is a data form with an assignment matrix which is based upon the Category, Type, Item, Region, Site and Department provided for the Change Request categorization.
- The user has a valid login and password for the Remedy Change application.
- The user has the correct licensing to update a Change Request/Task.
- The user has the correct permissions to update a Change Request/Task.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the task in the Assigned table. This will open the Change Task form window with the task information fields populated.
3) User will click on the menu attached to the Status field located in the upper right corner of the view. User selects the status of "Work In Progress".
4) User then selects their name from the Individual drop down list on the Task Info tab.
5) Click on the Assessment tab. (Planned Start/End Dates May be changed based upon the mutually agreed upon dates)
6) User will click on the text editor button next to the Work Log field. The user will add information to the Work Log and then click the OK button.(Enter into the Work Log any changes that were made, who requested them, and notes from discussions with others teams to change dates)
7) (Optional / Not at this time) User then clicks on the Activity tab and enters time spent in the Time Spent field.
8) Click the Save button.
9) A message appears indicating that the requester and the person supervising/assigned the Change Request will be notified that the Status has change to "Work In Progress". Click OK to clear this message.
10) To return to the Support Console, click Close to close the task window.

USE CASE PROCESS DIAGRAM



CANCELING TASKS

Use Case Name:	Canceling Tasks
Description:	The cancellation of a task that has already been added to a Change Request.
Actors:	Change Supervisor
Status:	Current

Note: If and when the last task is cancelled/closed, the entire ticket will set itself to Resolved status in three days

FREQUENCY

This use case is to be invoked every time a Change Task needs to be canceled.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The task does not possess a Status of “Closed”.

POST CONDITIONS

- Task records have been updated. Status is changed to “Closed”.

ASSUMPTIONS

- There is a data form in Remedy with an individual's information.
- There is a data form with an assignment matrix which is based upon the Category, Type, Item, Region, Site and Department provided for the Change Request categorization.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to update a Change Request/Task.
- The user has the correct permissions to update a Change Request/Task.

BASIC COURSE OF ACTION

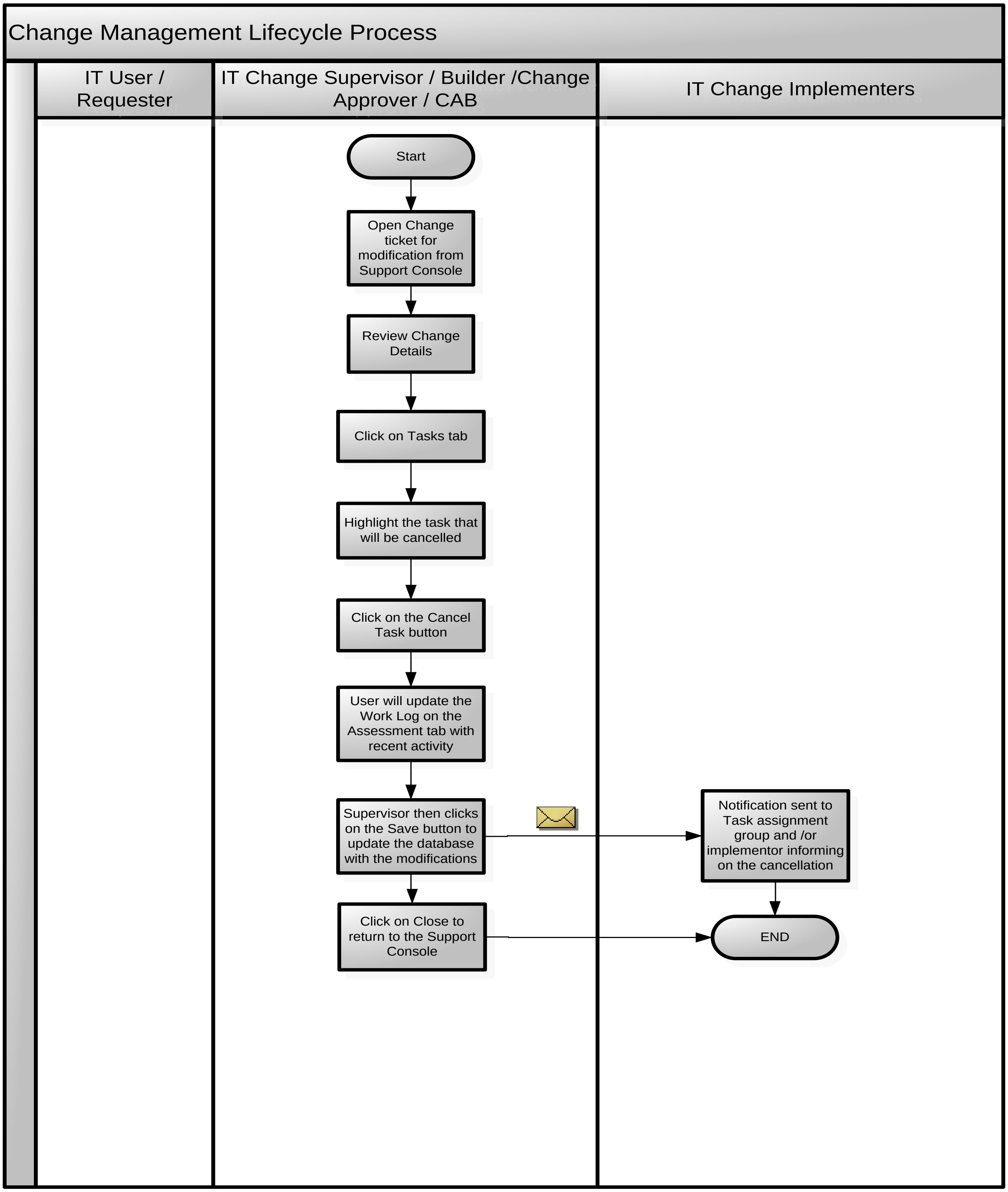
1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the request in the Assigned table. This will open the Change Request form window with the Change Request information populated.
3) Click on Tasks tab.
4) Select the task you want to cancel, and click Cancel Task.
5) The Task Work Log dialog box appears.
6) In the Work Log field, enter a reason for canceling the task.
7) Click OK.
8) The group or individual assigned that task is notified that the task has been canceled.
9) Change Task table is refreshed.
10) The task Status changes to "Closed".
11) Save the Change Request.
12) To return to the Support Console screen, click on the Close button of the Change Request form.

ALTERNATE COURSES OF ACTION

1) From the Remedy Support console, double click on the Task record in the Assigned Requests table. This will open the Task form window with the information fields populated.
2) Select "Closed" from the Status menu.
3) Select "Canceled" from the Closure Code menu.

4) Click the Assessment tab.
5) Enter the reason the task is to be canceled in the Work Log field.
6) Click the Save button.
7) An AR System User-Note box displays. If there was an individual assigned to the task, a notification will be sent informing them that the task has been canceled. If there was no individual assigned to the task, a notification will be sent to the associated support group informing them that the task has been canceled.
8) Click the OK button to close the AR System User-Note box.
9) Another AR System User-Note box displays stating the task has been modified.
10) Click the OK button to close the AR System User-Note box.
11) To return to the Support Console screen, click on the Close button of the Task form.

USE CASE PROCESS DIAGRAM



CHANGING THE TASK STATUS TO "CLOSED

Use Case Name:	Closing a Task
Description:	Changes the task Status to "Closed".
Actors:	Task Individual
Status:	Current

BUSINESS RULE 6B APPLIES TO CLOSING A TASK

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
6b	Technician completes a specific task (or multiple concurrent tasks) and changes status of Task from "Work	WORK IN PROGRESS	Shared Service Technician	• Updates the work-log and changes Task status to "Closed" when each task of the triggered sequence of	• Shared Service Technician is responsible for ensuring that assigned Task work is accurately performed and completed in a timely

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
	In Progress" to "Closed". If multiple tasks are sequenced, the first task completed will trigger the next sequenced task in line to begin.			work tasks is completed.	manner. • Shared Service Technician is responsible for updating the work-log and ensuring that the Task status is "Closed" upon completion of work activity, to allow a smooth transition of successor Tasks.

FREQUENCY

This use case is to be invoked every time a user needs to close a Change Task.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The task status is "Scheduled", "Work In Progress", or "Pending".

POST CONDITIONS

- Task Status is "Closed".
- Task is assigned to an individual.

ASSUMPTIONS

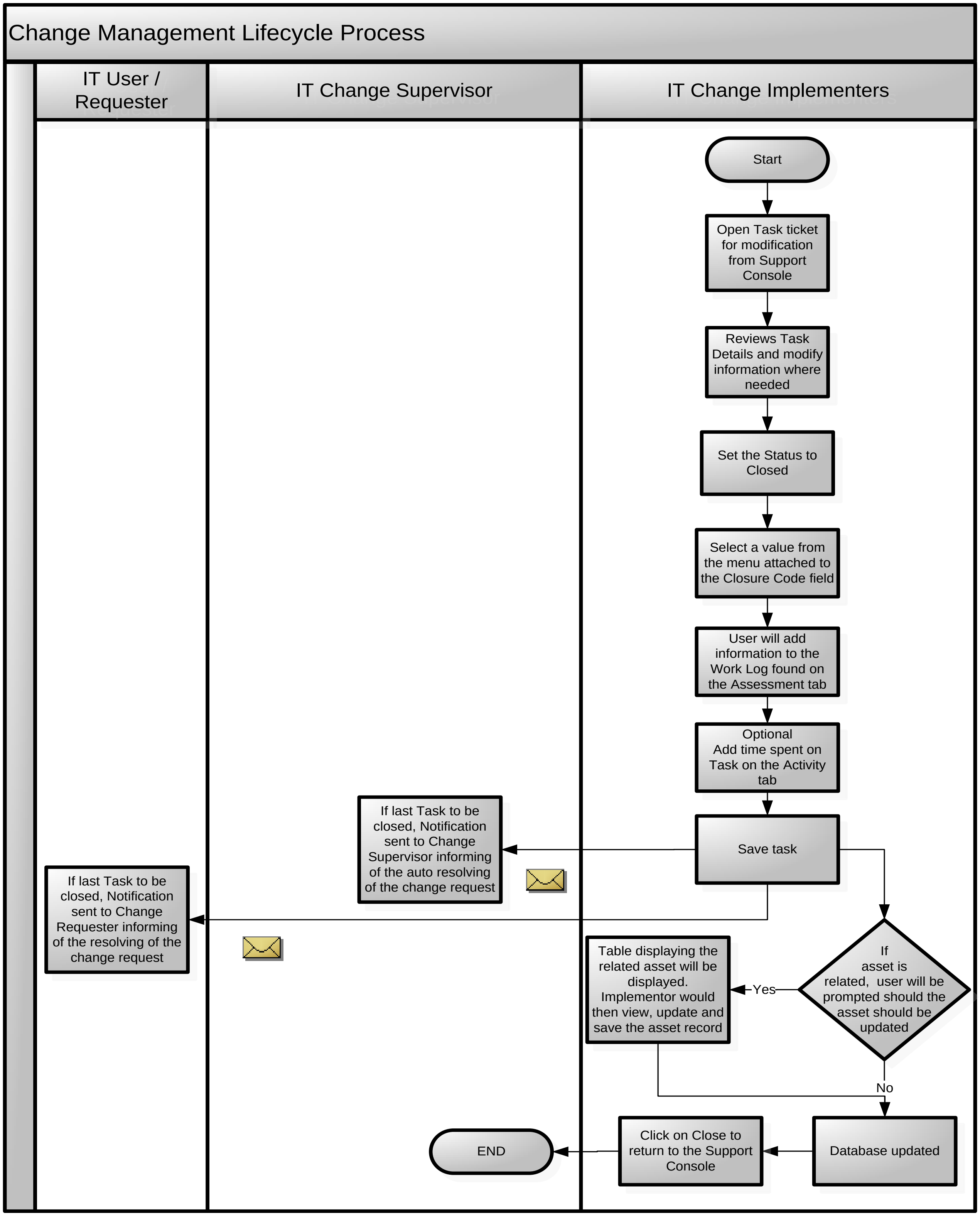
- There is a data form in Remedy with an individual's information.
- There is a data form with an assignment matrix which is based upon the Category, Type, Item, Region, Site and Department provided for the Change Request categorization.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to update a Change Request/Task.
- The user has the correct permissions to update a Change Request/Task.
- An asset is related to the Change Request.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the task in the Assigned table. This will open the Change Task form window with the task information fields populated.
3) Message appears telling the user to verify the task planned dates and to set the Status to "Work In Progress" if the task is not yet in a "Work In Progress" state. Click OK to clear this message. Various messages will appear based on the current state of the task.
4) User selects "Closed" from the Status menu. This indicates that the user has completed the task.
5) User makes a selection from the Closure Code menu.
6) User then selects their name from the Individual drop down list (if the task is not already assigned to them) that is located on the Task Info tab.
7) Click on the Assessment tab.
8) User will click on the diary button next to the Work Log field. The user will add information to the Work Log.
9) Click the OK button.
10) (Optional) User then clicks on the Activity tab and enters time spent in the Time Spent field.
11) Click the Save button.
12) (IMPORTANT) If this was the last task to be closed, a message appears indicating that the requester of the Change Request and the person supervising/assigned the Change Request will be notified that the Status of the Change Request has changed to "Resolved". Click OK to clear this message.
13) If an asset is related to the task record, a message appears asking if any assets have changed as a result of this task.

14) If you click Yes, then a window pops up with the asset related to the Change Request where you can then open that asset record and make updates.
15) If you click No the task record is saved.
16) To return to the Support Console screen, click the Close button to close the task window.

USE CASE PROCESS DIAGRAM



REASSIGNMENT OF A TASK

Use Case Name:	Reassignment of a Task
Description:	The reassignment of task.
Actors:	Task Individual Change Supervisor
Status:	Current

REMINDER: Even if you are sick or away from your desk, work must go on. DO NOT reassign to someone who is not there.

FREQUENCY

This use case is to be invoked every time a task is assigned to a group and the individual needs to reassign the task to another group.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.

- The task has been created and is assigned to a support group.

POST CONDITIONS

- The task has been reassigned to another group.
- Status is “Scheduled”.

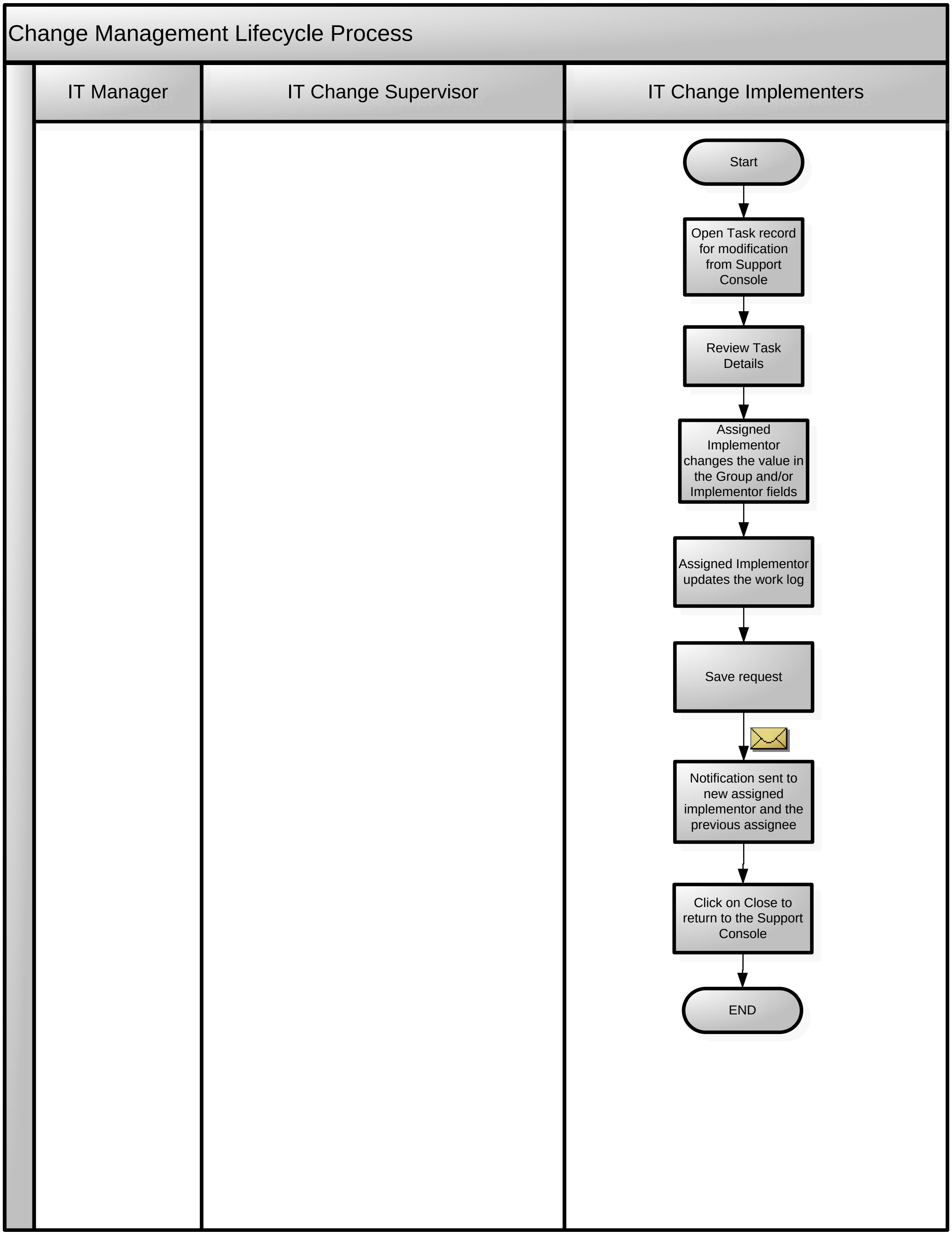
ASSUMPTIONS

- There is a data form in Remedy with an individual’s information.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to modify a request.
- The user has the correct permissions to modify a request.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the task in the Assigned table. This will open the task form window with the task information fields populated.
3) The task form with the task information will be displayed.
4) If the reassignment involves a group, the user will click on the Group menu to select another group.
5) If the reassignment involves an individual assignee, the user will click on the Individual menu to select another individual to implement the task.
6) The user will click on the Activity tab.
7) The user will provide additional information in the Work Log. Click on the diary button next to the Work Log field. The user will enter the appropriate information and then click on OK.
8) The user will then click on Save.
9) To return to the Support Console screen, click on the Close button of the Task form.
10) An email/page is sent to the original assigned group or Individual to alert them that an existing task was reassigned to another group or Individual.
11) An email/page is sent to the new assigned group or Individual to alert them that an existing task was reassigned to that group or Individual.

USE CASE PROCESS DIAGRAM



PLANNING OF A CHANGE REQUEST

Use Case Name:	Planning of a Change Request
Description:	The planning phase of a Change Request.
Actors:	Change Supervisor
Status:	Current

BUSINESS RULES 4A, 4B, AND 4C APPLY TO THE PLANNING OF A CHANGE REQUEST.

UPDATE PLANNED START / PLANNED END DATES (STATUS = "PLANNING")

Description: Shared Service Manager updates request with estimated Planned Start / End dates based on Priority of request and Resource Assessment of available technicians.

Rule #	**Objective(s)**	**Request Status**	**Responsible Area**	**Activities**	**Business Rules**
4a	Change the Service Request status to "Planning", update request with Planned	PLANNING	Shared Service team	• Performs a Resource Assessment of available technicians to	• Shared Service manager (or appointed delegate) is responsible for updating the

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
	Start / End Dates, and add Tasks (when applicable).			respond to the Service Request. • Reviews the Urgency and Requested Date expectations as specified from the customer. • Determines an appropriate time frame to begin / end the request based on the Priority and technician resources available. • Updates Service Request with Planned Start / End Dates and	Service Request with Planned Start / End Dates, based on the availability of staff resources (as identified in a Resource Assessment), and also based on consideration of the customer Priority / Requested Date expectations. • Shared Service manager (or appointed delegate) is responsible for updating the work-log any time the status of the request has been changed.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				work-log entry, and changes status of request to “Planning”.	
4b	Shared Service team seeks to revise / change the original Planned Start / End Dates to new / revised dates.	PLANNING	Shared Service team	• Determines that work activities cannot be performed in the original Planned Start / End Dates. • Consults with Requested By / customer to gain mutually agreed revised Planned Start / End Date expectations. • Informs the Service Desk (when applicable)	• Shared Service team (in general) is responsible to follow up with the Requested By immediately if the Planned Start / End Dates need to be revised or changed. Only after consulting the Requested By / Customer and gaining a mutual agreement on revised Planned Start / End Dates may the request be changed to reflect the new Dates. The work-log must be updated to indicate that the Requested

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				of revised planned work activities. • Updates work-log to indicate that customer has been consulted and agrees to revised Planned Start / End Dates.	By was consulted prior to making the Planned Start / End Date revision.
4c	Customer seeks to revise / change the original Planned Start / End Dates to new / revised dates.	PLANNING	Requested For	• Contacts the Service Desk on behalf of the Requester, Task Coordinator, or management to request a change to the original Planned Start / End Dates in the	• Requested By is responsible for contacting the Service Desk immediately if there is a need to revise or change the original Planned Start / End Dates as specified in the Service Request. • Requested By is responsible

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				Service Request. • Consults the Service Desk and / or Shared Service team on mutually agreed upon revised / new Planned Start / End Dates.	for consulting with the Requester, Task Coordinator, Management, and also with the Service Desk or Shared Service team to come to mutually agreed upon revised / new dates.

FREQUENCY

This use case is to be invoked each time a Change Request goes through the planning stage.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The request has been created and is assigned to a support group.

POST CONDITIONS

- The Change Request has a Status of “Planning”. It has a support group and supervisor assigned to implement the Change Request.

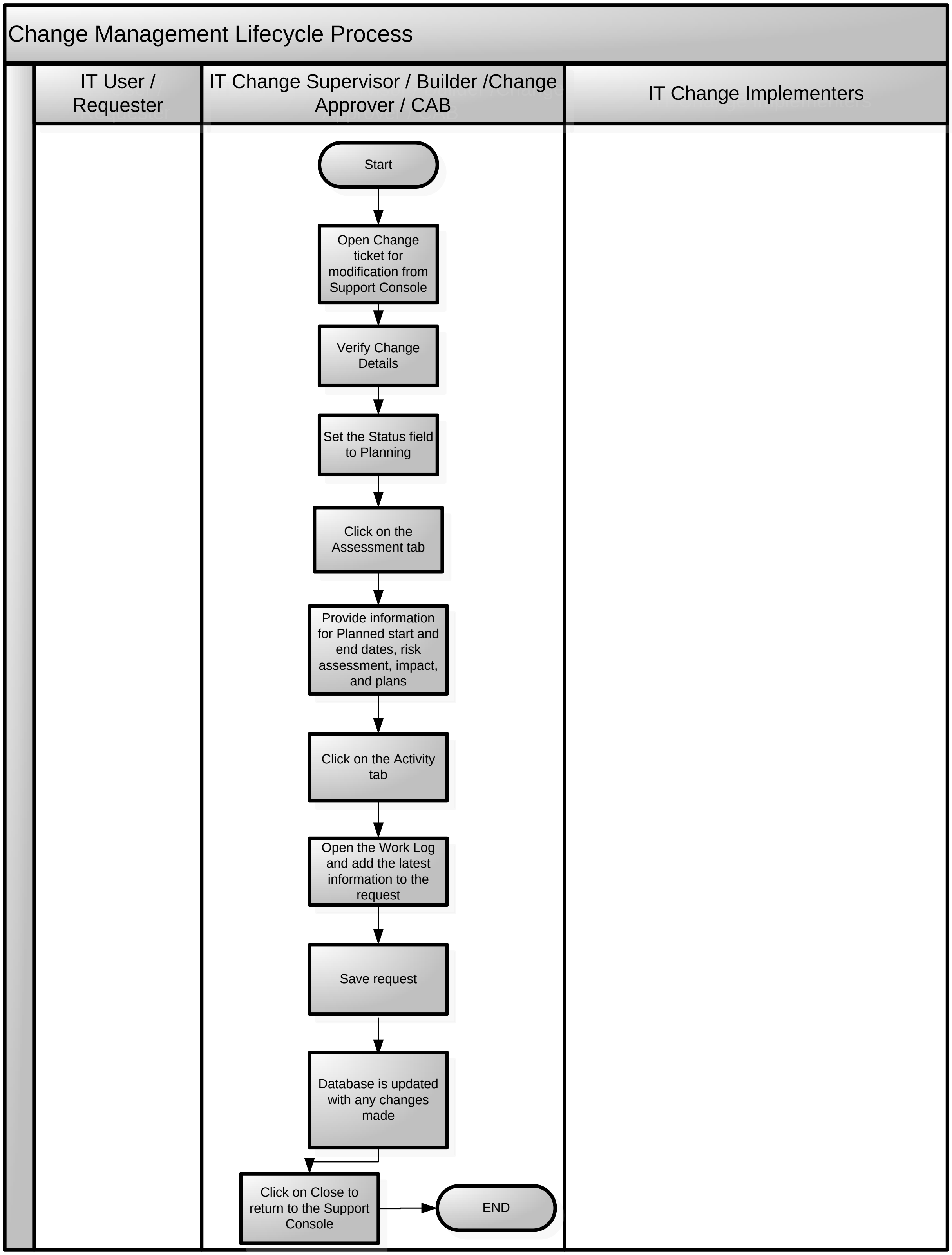
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to modify a request.
- The user has the correct permissions to modify a request.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all incidents, Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the Change Request in the Assigned table. This will open the Change Request form in a modify window with the Change Request information fields populated.
3) Select "Planning" from the Status menu.
4) Click on the Assessment tab.
5) Verify that the planned start time, planned end time and planned person hours fields are completed.
6) (Optional) Verify that the assessment fields for risk and plan fields are completed.
7) (Optional) Verify that the estimated number of users impacted fields by location, by assets and impact fields are completed.
8) (Optional) Verify that any change documents are attached to Change Request.
9) Click on the Activity tab.
10) Click in the Work Log and type in any other information that is needed to give the Change Request "Planning" Status.
11) Click on the Save button.
12) The Change Request information is updated in the database.
13) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



SCHEDULING OF A CHANGE REQUEST

Use Case Name:	Scheduling of a Change Request
Description:	The scheduling of a Change Request for implementation. It will require that the planned times are completed. Other fields such as risk assessment, estimated number of users impacted, and planning documents are optional. All tasks necessary to implement the Change Request should also have been created.
Actors:	Change Supervisor
Status:	Current

BUSINESS RULE 5C IS APPLIED TO THE SCHEDULING OF A CHANGE REQUEST

RULE #	OBJECTIVE(S)	REQUEST STATUS	RESPONSIBLE AREA	ACTIVITIES	BUSINESS RULES
5C	Change the status of the Service Request to “Scheduled” to initiate the start of work task activities for assigned	Scheduled	Shared service team	• Updates the work-log with a new entry, and saves the Service Request with a	• Shared service manager (or appointed delegate) is responsible for changing the status of any Service Request

RULE #	OBJECTIVE(S)	REQUEST STATUS	RESPONSIBLE AREA	ACTIVITIES	BUSINESS RULES
	technicians.			"Scheduled" status.	with assigned tasks to "Scheduled" when the request is ready to begin work tasks. • ***Note**: Auto-notification of the technician of assigned tasks will not commence until the request is given "Scheduled" status.*

FREQUENCY

This use case is to be invoked each time a Change Request has associated Tasks. This stage is optional for other Change Requests.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.

- The request has been created and is assigned to a support group.
- A Change Request record has been created and assigned to a group and an individual to implement.
- If required, the Change Request has been approved.

POST CONDITIONS

- The Change Request has a Status of "Scheduled". It has a support group and supervisor assigned to implement the Change Request.

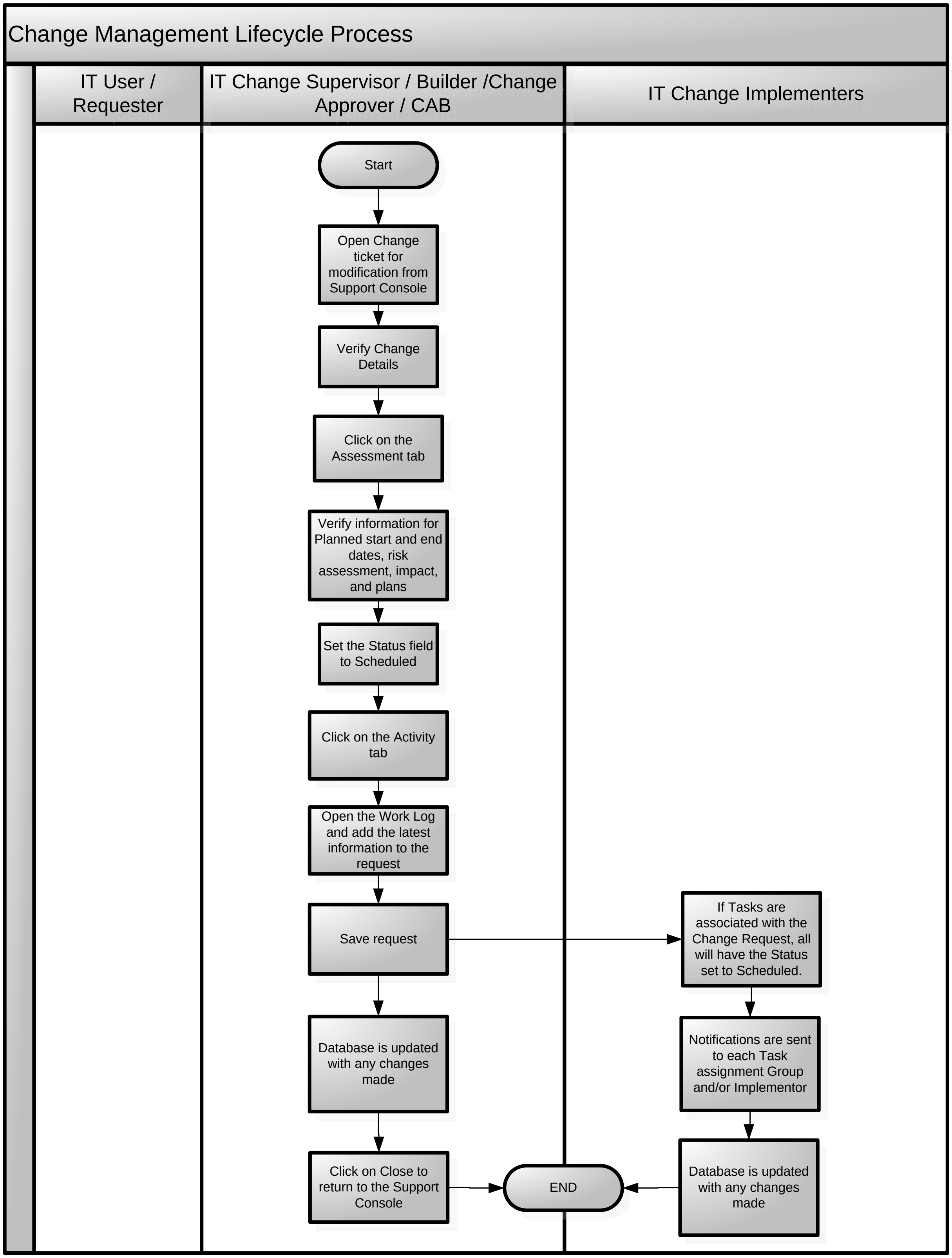
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to modify a request.
- The user has the correct permissions to modify a request.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all incidents, Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the Change Request in the Assigned table. This will open the Change Request form window with the Change Request information fields populated.
3) Click on the Assessment tab.
4) Verify that the planned start time, planned end time and planned person hours fields are completed.
5) (Optional) Verify that the estimated number of users impacted fields by location, by assets and impact fields are completed.
6) (Optional) Verify that any change documents are attached to the Change Request.
7) Click on the Activity tab.
8) Click in the Work Log and type in any other information that is needed to give the Change Request a "Scheduled" Status.
9) Click on the Status field and choose "Scheduled".
10) Click on the Save button.
11) The Change Request information is updated in the database.
12) If Tasks are associated with this Change Request, all their Statuses will change to "Scheduled".
13) An email/page will be sent to each Task assignment group and/or Individual notifying them of the scheduled task.
14) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



PENDING A CHANGE REQUEST FOR APPROVAL

Enterprise Change Request

Use Case Name:	Pending A Change Request For Approval
Description:	The modification of an existing Change Request (Via the Remedy desktop client or web client) by an End User or Change Supervisor to initiate the Change Request approval process.
Actors:	Requester – Person initiating the request. End User Service Desk agent IT Support Staff Change Supervisor – The individual listed in the Supervisor+ field in the Change Request.
Status:	Current

BUSINESS RULES 7A, 7B, AND 7C ARE ASSOCIATED WITH PENDING A CHANGE REQUEST

Placing a Service Request into a Pending state (Status = "Pending")

Description: When necessary, a Service Request can be placed into a Pending / hold status by the Service Desk based on input from the Customer or Shared Service team.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
7a	Customer may optionally contact the Service Desk to have the Service Request given a “Pending” status.	ASSIGNED / SCHEDULED	Requested By	• Identifies a need to not outright cancel, but give an open Service Request “Pending” (or Hold) status.	• Agency Requested By is responsible for contacting the Service Desk to inform them of a need to give the Service Request a “Pending” status (when applicable).
7b	Shared Service team consults with Service Desk to follow up with the Requested By concerning the need to change the status of the request to “Pending”.	ASSIGNED / SCHEDULED	Shared Service team	• Identifies a need to give an open Service Request “Pending” status. • Contacts the Service Desk to assist in follow up with the Requested	• Shared Service team is responsible for identifying circumstances where the request must be held and for seeking the assistance of the Service Desk to follow up with the Customer.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				By concerning giving the request a "Pending" status.	• Shared Service team is responsible for providing detailed information to the Service Desk as to the reason or circumstances related to giving an open request a "Pending" status.
7c	Service Desk updates the Service Request to reflect customer needs and changes its status to "Pending".	PENDING	Service Desk	• Updates the work-log and changes the status of the Service Request to "Pending". • Informs the Shared Service Assignment group or Manager of the reason for the "Pending" status	• Service Desk is responsible for identifying the "Pending" reason code, updating the work-log and saving the Service Request with a "Pending" status. • Service Desk is responsible for helping to follow up with the Assignment Group based on expectations from the

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				(Optional).	customer (when applicable).

FREQUENCY

This use case is to be invoked every time an existing Change Request requires approval in order for the change to be implemented in a production environment. This use case does not apply to a Change Type of "Service Request".

PRECONDITIONS

- The End User or Change Supervisor is logged into Remedy Change Management application.
- The End User or Change Supervisor is at the IT Service Management Support Console form in Remedy.
- A Change Request record has been created and assigned to a group to implement.
- A Change Request record has been created and assigned to an individual to implement.

POST CONDITIONS

- The Change Request is modified by the End User or Change Supervisor and initiates a predefined Remedy approval process (Process rules to be defined) where associated approver signature records are created and notifications are sent to the approvers. Once the necessary approval responses have been received, the Change Request will automatically be modified (Status = “Pending”, Pending = “Supervisor Action”) via Remedy approval process workflow, signifying to the Change Supervisor that action is required.

ASSUMPTIONS

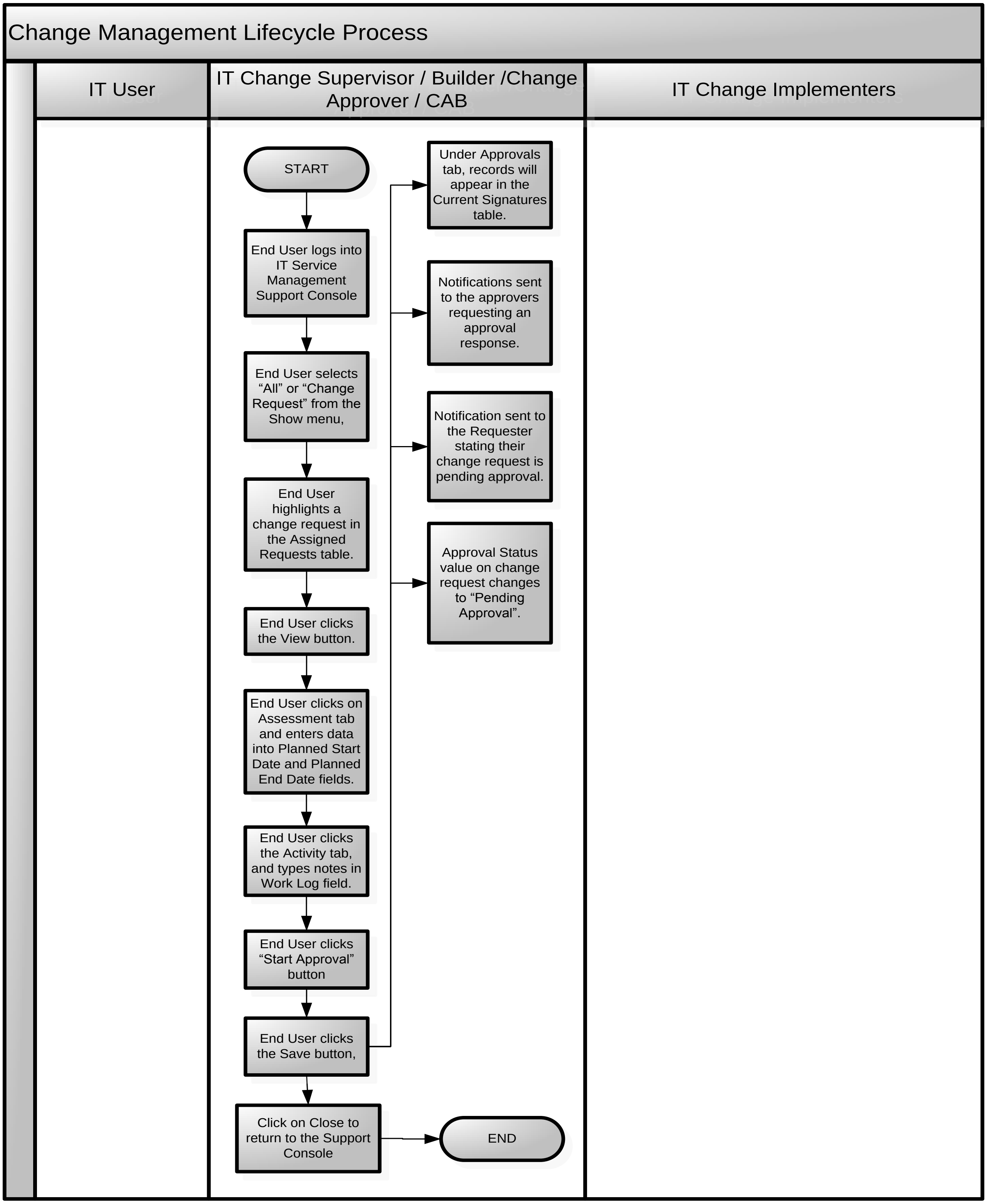
- The End User or Change Supervisor has a valid login and password for the Remedy Change Management application.
- The End User or Change Supervisor has the correct licensing to modify an existing Change Request.
- The End User or Change Supervisor has the correct permissions to modify an existing Change Request.
- The following Change Request fields will possess the following values:
- Approval Status = “Approval Required”
- Status = “New” OR Status = “Assigned” OR Status = “Planning”.

Note: OOTB workflow places restrictions on the Status value that can be selected for Change Requests requiring approval. For example, a Change Request requiring approval cannot possess a Status value greater than “Planning” (i.e. “Scheduled”) until the approval process has been completed.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in End User's support group(s).
2) Select "All" or "Change Request" from the Show menu located above the Assigned Requests table.
3) Highlight a row in the Assigned Requests table in the Support Console form with Request Type = "Change Request" (located below the Assigned Requests table).
4) Click the View button below the Assigned Requests table. Alternatively, double click on the request in the Assigned Requests table. This will open the Change Request form window with the Change Request information fields populated.
5) From the Remedy Change Request Assessment tab, populate the Planned Start Date and Planned End Date fields, if not already populated.
6) Click the Activity tab and type additional notes in the Work Log field.
7) Set the Status field to "Pending" and the Pending field to "Approval".
8) Click the Save button located in the lower left corner of the screen.
9) When you save the Change Request, several things happen:
10) Under the Approvals tab, record(s) will appear in the Current Signatures table indicating the approval responses required for the Change Request.
11) Notifications will be sent to the approvers requesting a response.
12) A notification will be sent to the Requested By stating that the Change Request they submitted is pending approval.
13) The Approval Status value will change from "Approval Required" to "Pending Approval".
14) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



PENDING A CHANGE REQUEST FOR PARTS, REQUESTER INFORMATION, SUPERVISOR ACTION, OR APPROVAL

Use Case Name:	Pending A Change Request For Parts, Requester Information, Supervisor Action, or Approval
Description:	The modification of an existing Change Request (Via the Remedy desktop client or web client) by an End User or Change Supervisor to indicate the request requires customer feedback or parts in order to be processed effectively.
Actors:	Requester – Person initiating the request. End User Service Desk agent IT Support Staff Change Supervisor – The individual listed in the Supervisor+ field in the Change Request.
Status:	Current

BUSINESS RULES 7A, 7B, AND 7C APPLY TO PENDING A CHANGE REQUEST FOR PARTS OR REQUESTER INFORMATION

Service Desk is responsible for identifying the "Pending" reason code, updating the work-log and saving the Service Request with a "Pending" status.

Service Desk is responsible for helping to follow up with the Assignment Group based on expectations from the customer (when applicable).

FREQUENCY

This use case is to be invoked every time an existing Change Request requires additional Requester feedback or parts not readily available.

PRECONDITIONS

- The End User or Change Supervisor is logged into Remedy Change Management application.
- The End User or Change Supervisor is at the IT Service Management Support Console form in Remedy.
- A Change Request record has been created and assigned to a group to implement.
- A Change Request record has been created and assigned to an individual to implement.

POST CONDITIONS

- The Change Request is modified by the End User or Change Supervisor and given "Pending" status until either the Requester provides the necessary feedback or parts become readily available.

ASSUMPTIONS

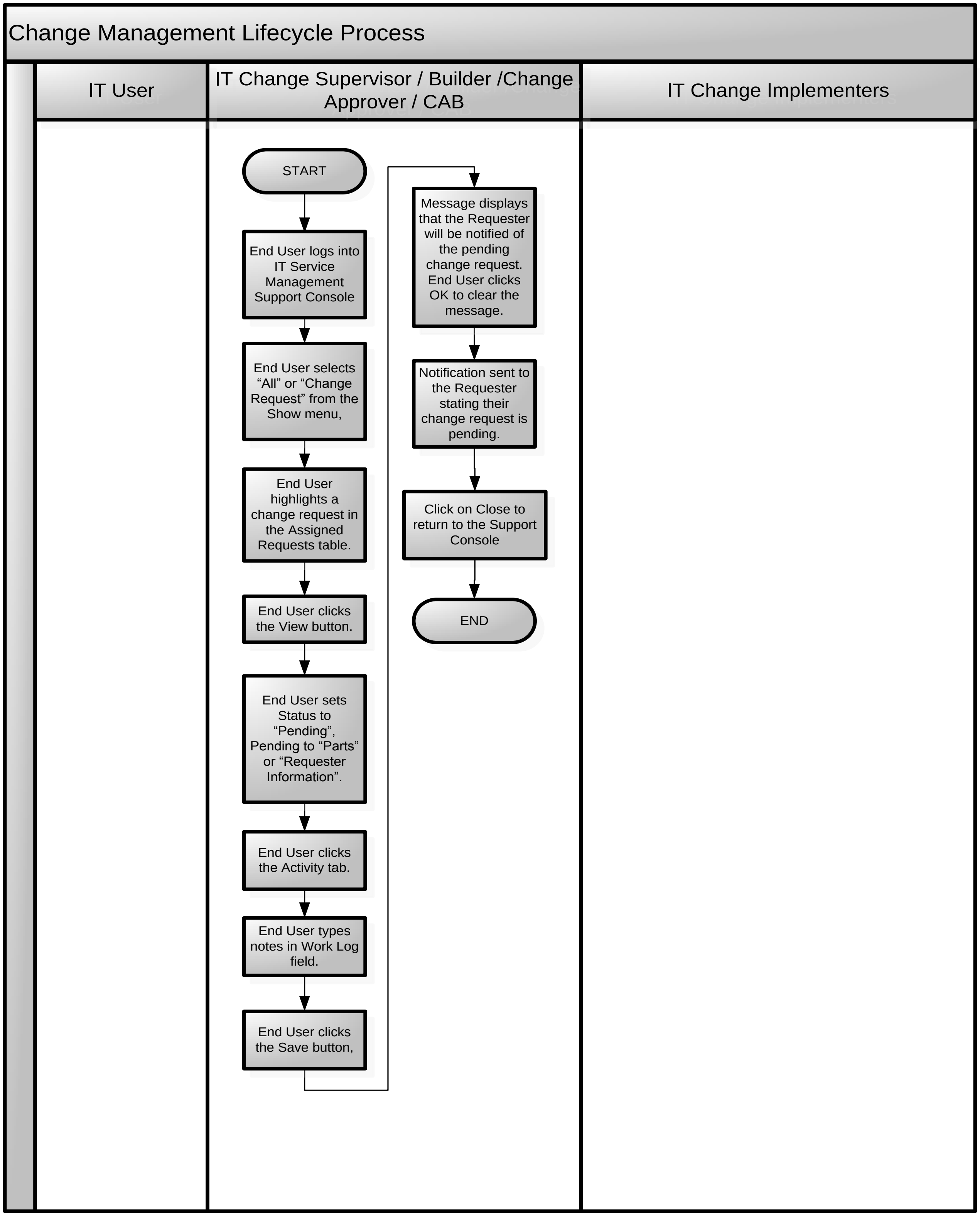
- The End User or Change Supervisor has a valid login and password for the Remedy Change Management application.

- The End User or Change Supervisor has the correct licensing to modify an existing Change Request.
- The End User or Change Supervisor has the correct permissions to modify an existing Change Request.
- The following Change Request fields will possess the following values:
- Approval Status = “Not Required” OR Approval Status = “Approved” OR Approval Status = “Rejected” OR Approval Status = “Approval Process Canceled”.
- Status = “New” OR Status = “Assigned” OR Status = “Planning” OR Status = “Scheduled” OR Status = “Work In Progress” OR Status = “In Rollback”.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in End User's support group(s).
2) Select "All" or "Change Request" from the Show menu located above the Assigned Requests table.
3) Highlight a row in the Assigned Requests table in the Support Console form with Request Type = "Change Request" (located below the Assigned Requests table).
4) Click the View button below the Assigned Requests table. Alternatively, double click on the request in the Assigned Requests table. This will open the Change Request form window with the Change Request information populated.
5) From the Remedy Change Request, select "Pending" from the Status menu.
6) From the Remedy Change Request, select "Parts", "Approval", Supervisor Action", or "Requester Information" from the Pending menu.
7) Click the Activity tab.
8) Type some notes in the Work Log field.
9) Click the Save button located in the lower left corner of the screen.
10) When you save the Change Request, several things happen:
11) A message displays stating that the Requester will be notified of the pending Change Request. Click OK to clear the message.
12) A notification will be sent to the Requester stating that the Change Request they submitted is pending parts or requester information.
13) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



RESOLVING A CHANGE REQUEST

Use Case Name:	Resolving A Change Request
Description:	The modification of an existing Change Request (Via the Remedy desktop client or web client) by an End User or Change Supervisor to indicate that the request has been implemented in a production environment (Status = "Resolved"). Out of the box (OOTB) Remedy workflow will require that all of the tasks necessary to implement the Change Request have been completed (Status = "Closed").
Actors:	Requester – Person initiating the request. End User Service Desk agent IT Support Staff Change Supervisor – The individual listed in the Supervisor+ field in the Change Request.
Status:	Current

Business Rules 13a and 13b are associated with Resolving a Change Request

Service Request Close-Out Activities (Status = "Resolved")

Description: Shared service technician completes all related activities and Resolves the last Task of a request.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
13a	Technician ensures that all work activity has been completed and status for each task has been changed to "Closed".	RESOLVED	Shared Service Technician	• Completes all work activity, updates the work-log and changes status for all assigned Task(s) to "Closed".	• Shared Service Technician is responsible for providing updates to the work-log and changing the status of each assigned Task to "Closed".
13b	Technician ensures that all work activity for Service Requests with no assigned Tasks has been completed, and manually changes the Status of the request to "Resolved".	RESOLVED	Shared Service Technician	• Updates the work-log and changes status of Service Request to "Resolved".	• Shared Service Technician is responsible for all work activity and necessary customer follow-up to verify completion of the Service Request before manually changing the status of the request to "Resolved".

FREQUENCY

This use case is to be invoked every time an existing Change Request is resolved.

PRECONDITIONS

- The End User or Change Supervisor is logged into Remedy Change Management application.
- The End User or Change Supervisor is at the IT Service Management Support Console form in Remedy.
- A Change Request record has been created and assigned to a group to implement.
- The Change Tasks related to the Change Request have been completed (Status = “Closed”).

  Note: OOTB workflow does not automatically resolve a Change Request when the last associated Change Task is closed.

POST CONDITIONS

- The Change Request is modified by the Change Supervisor with a Status of “Resolved”.

ASSUMPTIONS

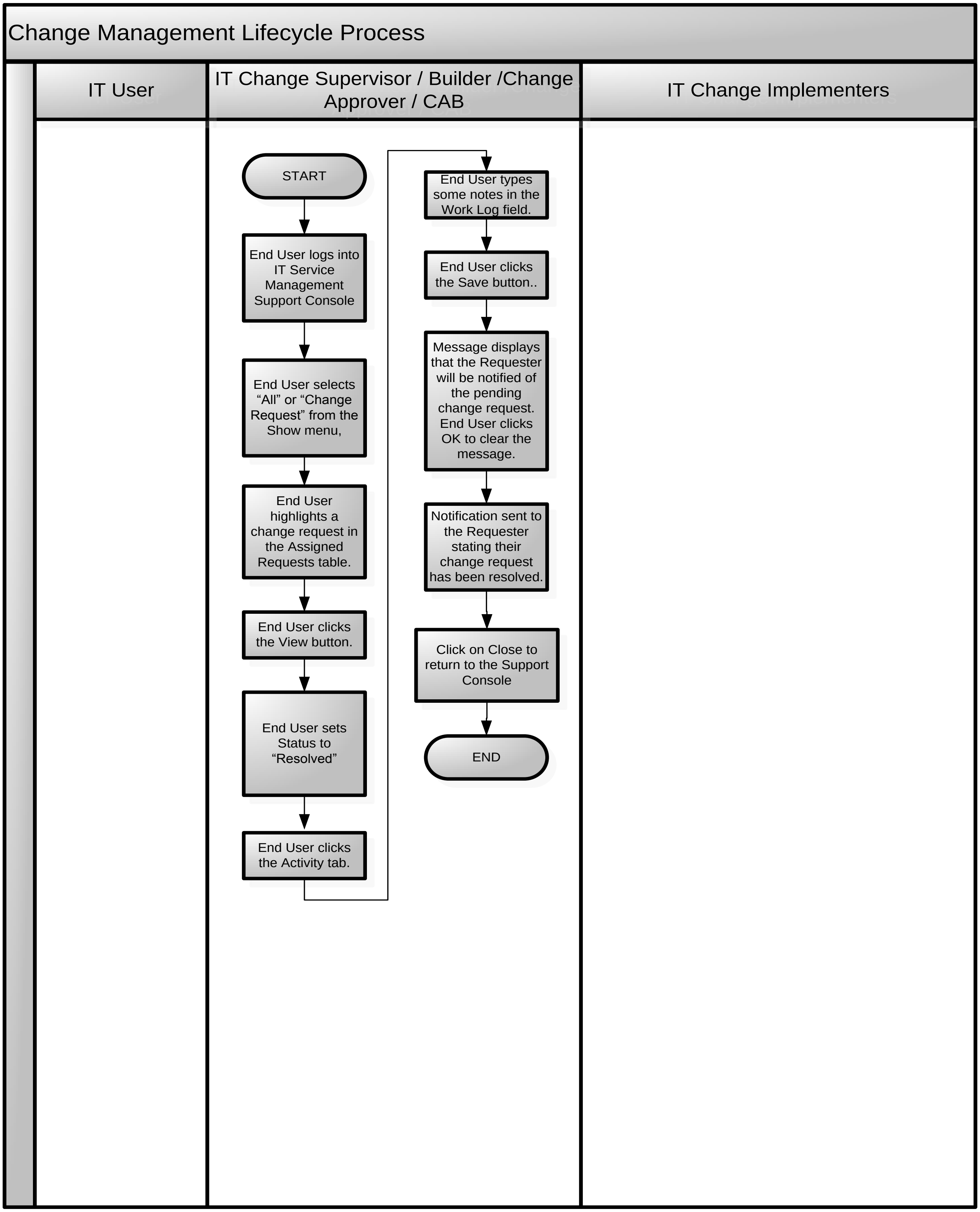
- The Change Supervisor has a valid login and password for the Remedy Change Management application.

- The Change Supervisor has the correct licensing to modify an existing Change Request.
- The Change Supervisor has the correct permissions to modify an existing Change Request.
- The following Change Request fields will possess the following values:
- Approval Status = "Not Required" OR Approval Status = "Approved" OR Approval Status = "Rejected" OR Approval Status = "Approval Process Canceled".
- Status = "Pending" (with Pending = "Supervisor Action") OR Status = "Work In Progress" OR Status = "In Rollback".

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all Change Requests and Change Tasks assigned to the logged in End User's support group(s).
2) Select "All" or "Change Request" from the Show menu located above the Assigned Requests table.
3) Highlight a row in the Assigned Requests table in the Support Console form with Request Type = "Change Request" (located below the Assigned Requests table).
4) Click the View button below the Assigned Requests table. Alternatively, double click on the request in the Assigned Requests table. This will open the Change Request form window with the Change Request information fields populated.
5) From the Remedy Change Request, select "Resolved" from the Status menu.
6) Click the Activity tab.
7) Type additional information into the Work Log field. All tasks should be set to "Closed". The information in the Work Log should explain what was done, when and by whom, and what results took place. (Is the customer happy with the result?).
8) Click the Save button located in the lower left corner of the screen.
9) When you save the Change Request, several things happen:
10) A message displays stating the Requester will be notified that the Change Request has been resolved. Change Approver clicks OK to clear the message.
11) A notification is sent to the Requester stating that the Change Request they submitted has been resolved.
12) To return to the Support Console screen, click on the Close button of the Change Request form.
13) (IMPORTANT) When a Change Request is resolved the ticket will automatically be given "Closed" status in three days.

USE CASE PROCESS DIAGRAM



WORK IN PROGRESS /STATE OF A CHANGE REQUEST

Use Case Name:	Work In Progress state of a Change Request
Description:	The updating of a Change Request to a state of "Work In Progress".
Actors:	Change Supervisor Requester
Status:	Current

Business Rules – Several Business Rules apply to "Work in Progress": 8a, 8b, 8c, 9a, 10b, 10c, 11a, 12a.

Performing a customer Escalation relating to a Service Request (Status = "Scheduled", "Pending" or "Work In Progress")

Description: Customer calls the Service Desk and requests an Escalation of an open Service Request.

Rule #	**Objective(s)**	**Request Status**	**Responsible Area**	**Activities**	**Business Rules**

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
8a	Task Coordinator or Requested By calls the Service Desk on behalf of the Requester and asks to speak to a Service Desk Supervisor to request an Escalation of the Service Request.	SCHEDULED PENDING WORK IN PROGRESS RESOLVED	Requested By	• Consults with Requester to determine a need to request an Escalation. • Contacts the Service Desk and asks to speak to a Service Desk Supervisor to request an Escalation relating to a Service Request in “Scheduled”, “Pending”, “Work In Progress”, or “Resolved” status. • Provides details or justification to the	• Task Coordinator or Requested By is Responsible for contacting the CMS Service Desk to initiate the Escalation of a Service Request. • Task Coordinator or Requested By is responsible for providing information, details and / or justification relating to the business need to perform an Escalation of the Service Request. • Task Coordinator or Requested By is responsible for initiating the Escalation

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				Service Desk pertaining to the nature of the Escalation.	while the Service Request is in either a "Scheduled", "Pending", "Work In Progress", or "Resolved" status. • *Note: When the request is in "Closed" Status, the request cannot be re-opened. A New Service Request or an Incident must be opened and related to the Closed Service Request.*
8b	Service Desk performs an Escalation on behalf of the customer for	SCHEDULED PENDING	Service Desk Supervisor	• Consults with Task Coordinator or Requested By to determine the need or	• Service Desk Supervisor is responsible for consulting with the Task Coordinator or Requested By and will

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
	the Shared Service Manager of the Assigned Group associated to the Service Request.	WORK IN PROGRESS RESOLVED		scope regarding Escalating the request. • Determines the Action Items that are mandatory to complete the follow up with the Customer. • Changes the Priority and Urgency on the Service Request to Urgent. • Changes the Escalated field in the Service Request from No to Yes.	determine if there is a need to perform an Escalation. • Service Desk Supervisor is responsible for changing the Priority and Urgency in the Service Request to Urgent if there is an Escalation. • Service Desk Supervisor is responsible for changing the Escalated field from No to Yes in the Service Request. • Service Desk Supervisor is responsible for contacting the Assignment Group Manager or Supervisor directly to consult with them on the

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				• Contacts the Assignment Group Manager or Supervisor and identifies all Action Item follow up steps to be taken with the customer.	details and expectations pertaining to the Action Item follow up with the Customer. • Service Desk Supervisor is responsible for entering all details concerning the steps required to satisfy the customer into the work-log of the Service Request.
8c	Shared Service Manager is provided with details on the customer Escalation of a Service Request and performs all follow up Action	SCHEDULED PENDING WORK IN	Shared Service Manager	• Informed by Service Desk Supervisor of the details of an Escalated Service Request. • Completes all Action Items in follow up with the Customer as	• Shared Service Manager is responsible for reviewing the details of the Service Request and for taking immediate steps to perform the Action Item follow up in response to the Escalation.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
	Items as established by the Service Desk Supervisor.	PROGRESS RESOLVED		identified by the Service Desk Supervisor.	• Shared Service Manager is responsible for contacting the Task Coordinator or Requested By, and for providing details on the necessary steps taken to Resolve the Escalated Service Request. • Shared Service Manager is responsible for ensuring work-log details are documented after all Resolution steps are completed. • Shared Service Manager is responsible for ensuring that the Service Request is

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					Resolved in a timely manner as specified by the Service Desk Supervisor.

CREATING A NEW ASSET RECORD RELATED TO A SERVICE REQUEST (STATUS = "WORK IN PROGRESS")

Description: Shared service technician adds any new Assets that are identified in relation to a Service Request.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
9a	Technician identifies all Assets related to the Service Request and verifies existing Assets are available. Otherwise, technician will create a new Asset record	WORK IN PROGRESS	Shared Service Technician	• Identifies all Asset items that are related to the Service Request. • Verifies in Remedy that an Asset record exists for all CI's related to	• Shared Service Technician is responsible for identifying all Assets / CI's related to the Service Request and for verifying that an Asset record exists for each item.

	for the Configuration Item (CI). Note: This functionality will be limited.			the Service Request. • Creates new Asset record(s) for any applicable CI's related to the Service Request.	• Shared Service Technician is responsible for creating a new Asset record for any Asset / CI that is not identified.

RELATING ASSETS TO A SERVICE REQUEST (STATUS = "NEW", "WORK IN PROGRESS")

Description: Shared service technician relates all associated Asset(s) to a Service Request.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
10b	Shared Service Technician identifies new or additional Assets / CI's related to the Service Request and creates a new Relation of the Assets to the Requester.	WORK IN PROGRESS	Shared Service Technician	• Identifies new or additional Assets related to Service Request. • Consults with Task Coordinator to learn details of the Asset information. • Creates new Asset relationship to the Service Request.	• Shared Service Technician is responsible for ensuring all Assets / CI's related to the customer are Related to the Service Request. • Shared Service Technician is responsible for reviewing any Asset item as identified by the Service Desk and for verifying the Asset information is correct.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
10c	Shared Service Technician identifies new or additional Assets / CI's related to the Service Request and creates a new Relation of the Assets to the Requester.	WORK IN PROGRESS	Shared Service Technician	• Identifies new or additional Assets related to Service Request. • Consults with Task Coordinator to learn details of the Asset information. • Creates new Asset relationship to the Service Request.	• Shared Service Technician is responsible for ensuring all Assets / CI's related to the customer are Related to the Service Request. • Shared Service Technician is responsible for reviewing any Asset item as identified by the Service Desk and for verifying the Asset information is correct.

RELATING ASSETS TO THE REQUESTED FOR (END USER) (STATUS = "WORK IN PROGRESS")

Description: Shared service technician associates all identified CI's related to the Service Request to the Requester.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
11a	Shared Service Technician relates all Assets associated to the Requester as identified in the Service Request.	WORK IN PROGRESS	Shared Service Technician	• Creates or Updates relationship of the Requested For to all identified Assets in the Service Request.	• Shared Service Technician is responsible for associating all identified Assets related to the Service Request to the Requester. • Shared Service Technician is responsible for updating, revising or creating a new Asset relationship to the Requested For (as required).

RELATING MULTIPLE DEPENDENT (OR NON-DEPENDENT) SERVICE REQUESTS TOGETHER (STATUS = "WORK IN PROGRESS")

Description: Service desk or the Shared Service Team relates multiple Service Requests together.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
12a	Identify all associated Service Requests and create a relation dependency (as needed).	SCHEDULED WORK IN PROGRESS	Shared Service Team	• Identify all Service Requests that would be related to each other, and determine whether dependency is required. • Identify the order of sequence of any dependent Service Requests that are related (as needed). • *Note: It is a recommended best practice to group by location (RSD) or by deployment date (planned start / end)*	• Shared Service Team is responsible for relating multiple Service Requests together (as needed). • Shared Service Team is responsible for establishing a sequence order for all related Service Requests (as needed). • Shared Service Team is responsible for Resolving all related Service Requests in the related / sequenced order that has been established. • Shared Service Team is responsible for allowing up to – and no more than – 10

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				for Service Requests that are used for up to 10 Asset related moves within one request.	(maximum) Asset moves to be assigned and tracked within one Service Request, and to include specific details on all Assets in the Attachment section (Required).

FREQUENCY

This use case is to be invoked whenever a Change Request is considered to be in a "Work In Progress" state.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The request has been created and is assigned to a support group.

- A Change Request record has been created and assigned to a group and an individual to implement.
- If required, the Change Request has been approved.

POST CONDITIONS

- The Change Request is in a Status of "Work In Progress”.
- There is a support group and possibly a supervisor assigned to the Change Request.

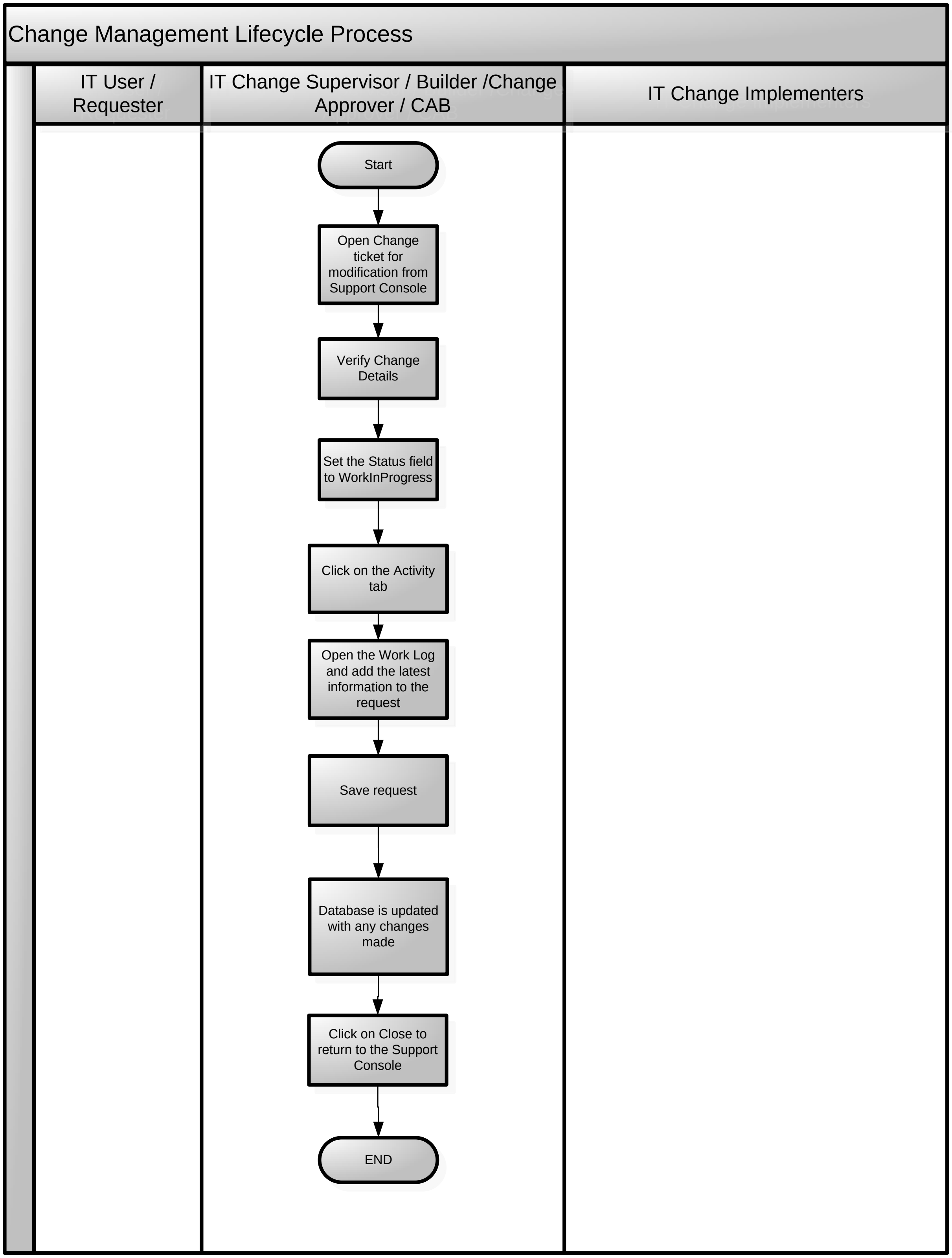
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to modify a request.
- The user has the correct permissions to modify a request.

BASIC COURSE OF ACTION

1) The Remedy IT Service Management Support Console will display all incidents, Change Requests and Change Tasks assigned to the logged in user's support group or the individual user.
2) From the Remedy IT Service Management Support Console, double click on the Change Request in the assigned table. This will open the Change Request form window with the Change Request information field populated.
3) Click on the menu attached to the Status field located in the upper right corner of the view and select "Work In Progress".
4) Change Supervisor will then click on the Activity tab.
5) Change Supervisor will click on the text editor button located to the right of the Work Log field. A dialog window will open. The top half of the window is READ ONLY while the bottom half is used to enter additional information about the status of the request.
6) Change Supervisor will enter text into the free form area of the Work Log dialog window. When finished, the end user will click on the OK button. The window will close and the user will be returned to the Change Request record.
7) Click on the Save button.
8) The Change Request information is updated in the database.
9) To return to the Support Console screen, click on the Close button of the Change Request form.

USE CASE PROCESS DIAGRAM



CREATE REMINDERS

Use Case Name:	Create Reminders
Description:	Any end user to the Remedy ITSM application suite has the ability to create and review reminders. Reminders are notifications which can be associated to a specific ITSM record (i.e. Help Desk or Change Request) or the reminder can stand alone. A Reminder can be scheduled to notify a specific group or individual.
Actors:	Requester – Person initiating the request. End User Service Desk agent IT Support Staff
Status:	Current

FREQUENCY

This use case is to be invoked every time a requester or end user would like to create a reminder.

PRECONDITIONS

- The user is logged into the client user or web tool.
- The user is at the Requester or Support Console form in Remedy.

POST CONDITIONS

- A reminder is created which is either associated to an ITSM record (Help Desk or Change Request) or stands alone.

ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- Assignment information is stored in the SHR:Assignment form and is based upon the Category, Type, Item, Region, Site and Department provided for the Change Request categorization.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct permissions to create a new reminder.

Form Notes

Reminder Information

Required fields: Notification, Time, Message, Notify, Recipient.

Optional fields: Link-to-Request-ID, Form, AR Login, Email, Subject, Log.

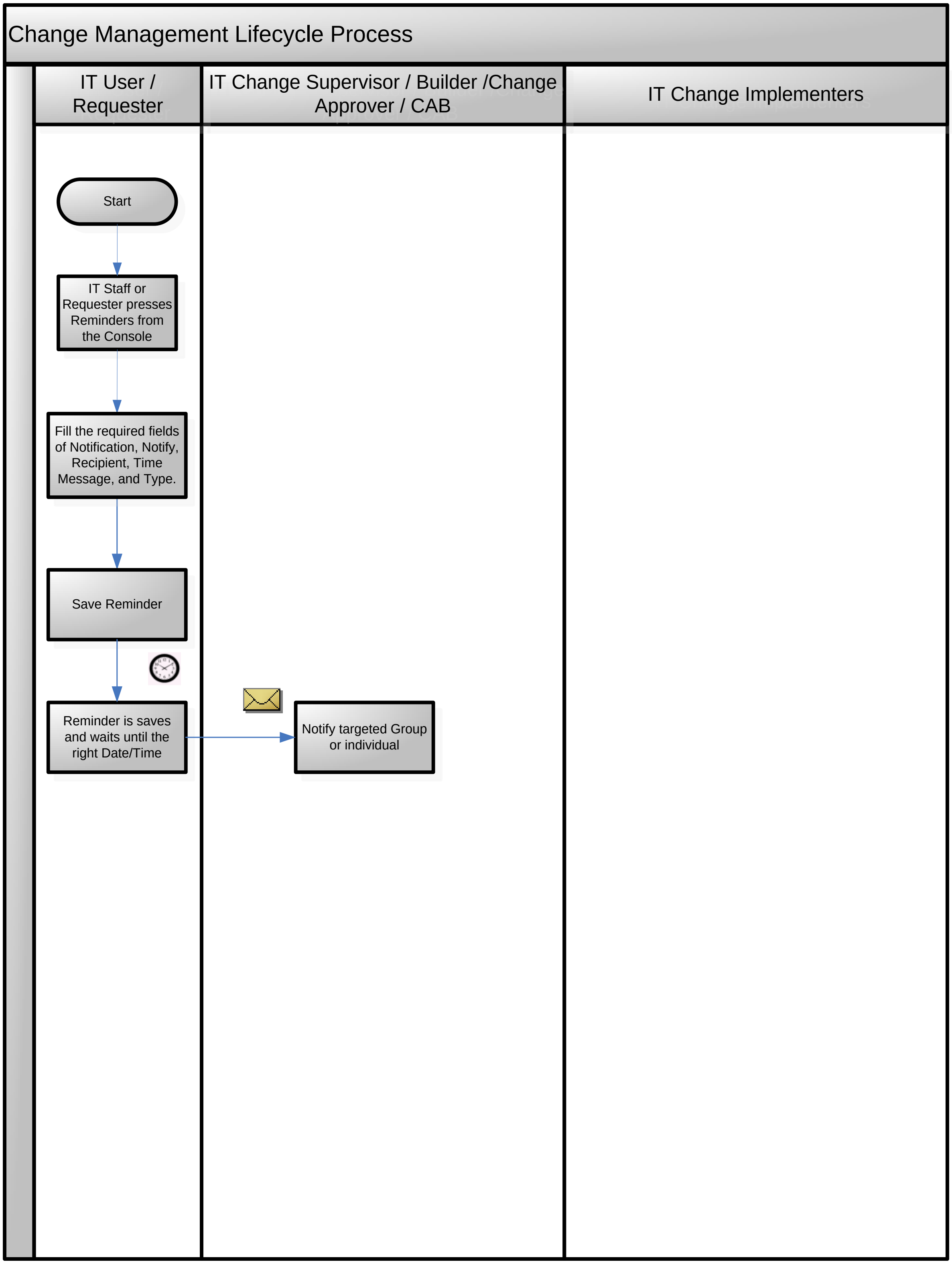
BASIC COURSE OF ACTION

1) From the Remedy Support or Requester Console, click on the reminder link. This will open a dialog window for the reminder where the end user can either review existing reminders or create a new reminder.
2) Click on Create Reminder tab.
3) Since the reminder is from the console, the Link-to-Request-ID and Form are blank.
4) In the Notification field, select the type of notification from the menu.
5) In the Time field, select the date and time when the reminder notification will be issued.
6) In the Notify field, select whether the notification will be sent to an Individual or a Group.
   Note: The selection of this field will determine the query type in the Recipient field.
7) In the Recipient field use the type-and-search function to query for the notification individual or group. When the end user selects the group or individual, the value will be placed in the field.
8) Enter a statement in the message field.
9) All other fields are optional.
10) Once completed, press Save button.
11) The Reminder will trigger when the Appropriate Date/Time is reached.
12) A Notification is issued to the recipient based on the Notification rules.

ALTERNATE COURSES OF ACTION

1) If the end user opens the Reminder option from an ITSM record (Help Desk or Change Request) the Link-To-Request-ID and Form will automatically be filled.

USE CASE PROCESS DIAGRAM



REVIEW BULLETIN BOARD MESSAGES

Use Case Name:	Review Bulletin Board Messages
Description:	Any end user to the Remedy ITSM application suite has the ability to review posted messages to a central Bulletin Board. The Bulletin Board is viewable from the Requester, Support, and Management consoles.
Actors:	Requester – Person initiating the request. End User Service Desk agent IT Support Staff
Status:	Current

FREQUENCY

This use case is to be invoked every time a requester or end user would like to review the Bulletin Board.

PRECONDITIONS

- The user is logged into the client user or web tool.

- The user is at the Requester or Support Console form in Remedy.

POST CONDITIONS

- The user reviewed an existing Bulletin Board message.

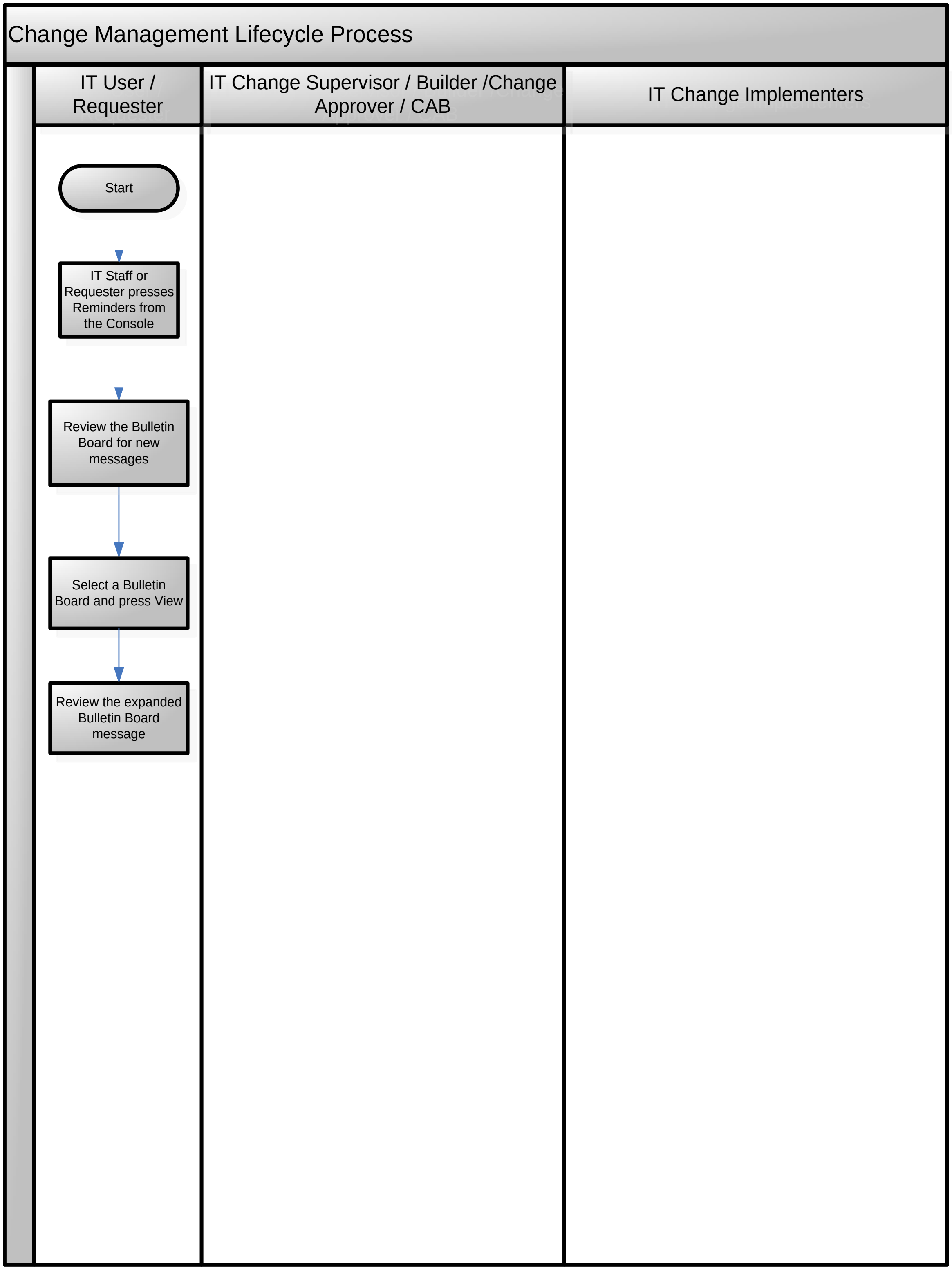
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- Assignment information is stored in the SHR:Assignment form and is based upon the Category, Type, Item, Region, Site and Department provided for the Change Request categorization.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct permissions to review the Bulletin Board.

BASIC COURSE OF ACTION

1) From the Remedy Support or Requester Console the end user can view the Bulletin Board to see if a pertinent message exists.
2) The end user can select a message in the Bulletin Board table and press the View button.
3) The Bulletin Board message expands to provide more information (including attached files).
4) The end user can press the Close button to close the open Bulletin Board message.

USE CASE PROCESS DIAGRAM



CREATE DEPENDENT CHANGE REQUEST

Use Case Name:	Create Dependent Change Request
Description:	The creation of a Change Request that belongs to a Change Request dependency chain.
Actors:	Change Supervisor
Status:	Current

BUSINESS RULES 5A, 5B, AND 5C ARE APPLIED IN ASSOCIATION WITH CREATING A DEPENDENT CHANGE REQUEST

Adding and Assigning Tasks down to the Technician level (Status = "Scheduled")

Description: Activity to add pre-defined or new tasks, sequence the order in which the tasks are to be completed (concurrently or dependent), and assign a specific Technician to complete each task. Change status of request to "Scheduled" when all tasks are added, assigned to a technician, and sequenced properly.

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
5a	Add predefined or new Tasks to the Service Request and, if necessary, sequence the order in which tasks may be completed.	PLANNING	Shared Service team	• Identifies all work related tasks necessary to complete the Service Request details. • Determines order in which work tasks must be sequenced (concurrent work or dependent upon a task). • Identifies the technician responsible for completing each specific work task. • Includes Tasks and related Attachments to	• Shared Service manager (or appointed delegate) is responsible for adding tasks to any Service Request with work tasks that are to be completed by more than one technician within their specific team, or work tasks that may be dependent upon additional / other shared service teams (Required). • Shared Service manager (or appointed delegate) is responsible for selecting from available pre-defined task lists or by manually adding in any new tasks

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				accommodate up to and no more than 10 Asset moves per one Service Request. • *Note: It is a recommended best practice to group by location (RSD) or by deployment date (planned start / end) for Service Requests that are used for up to 10 Asset related moves within one request.*	specific to the work necessary to complete the Service Request. • Shared Service manager (or appointed delegate) is responsible for making a determination of how work tasks are to be ordered / sequenced. Concurrent work tasks may share the same sequence number; Dependent work tasks must be numbered higher than tasks that must be completed first. Sequencing tasks is only necessary when applicable. • Shared Service Team is

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					responsible for allowing up to – and no more than – 10 (maximum) Asset moves to be assigned and tracked within one Service Request and for including specific details on all Assets in the Attachment section (Required).
5b	Assign a specific technician to each Task that has been added to the Service Request.	PLANNING	Shared Service team	• Identifies a technician to carry out the completion of a work task associated to the Service Request. • Updates the work-log with additional notes / instructions for the	• Shared Service manager (or appointed delegate) is responsible for assigning task level work to a specific technician and for providing any additional data in the attachments or work-log. • Shared Service manager (or appointed delegate) is

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
				technician to follow. • Ensures a final task is added at the end of every Service Request to review and verify completion of the request with the customer.	responsible for adding a pre-defined final task to ensure a QA follow up and review of the completion and quality of work with the customer (either the Requested By or Task Coordinator) in every single request (Required).
5c	Change the status of the Service Request to "Scheduled" in order to initiate the start of work task activities for assigned technicians.	SCHEDULED	Shared Service team	• Updates the work-log with a new entry and saves the Service Request with "Scheduled" status.	• Shared Service manager (or appointed delegate) is responsible for changing the status of any Service Request with assigned tasks to "Scheduled" when the request is ready to begin work tasks. • *Note: Auto-notification of*

Rule #	Objective(s)	Request Status	Responsible Area	Activities	Business Rules
					the technician of assigned tasks will not commence until the request is given a "Scheduled" status.

FREQUENCY

- The Use Case will be invoked when a Change Supervisor needs to create dependencies between Change Requests. When the Change Supervisor creates dependencies, the Change Supervisor must specify the sequence in which Change Requests are to be completed. For example, a Change Request with the sequence number 2 must be completed before a Change Request with the sequence number 3 can be started. If several Change Requests have the same sequence number, they can be started in any order.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The user has the correct permissions to generate a Change Request.

POST CONDITIONS

- The Change Request has been create and associated to another Change Request.
- The Change Request has been placed into a proper sequence.

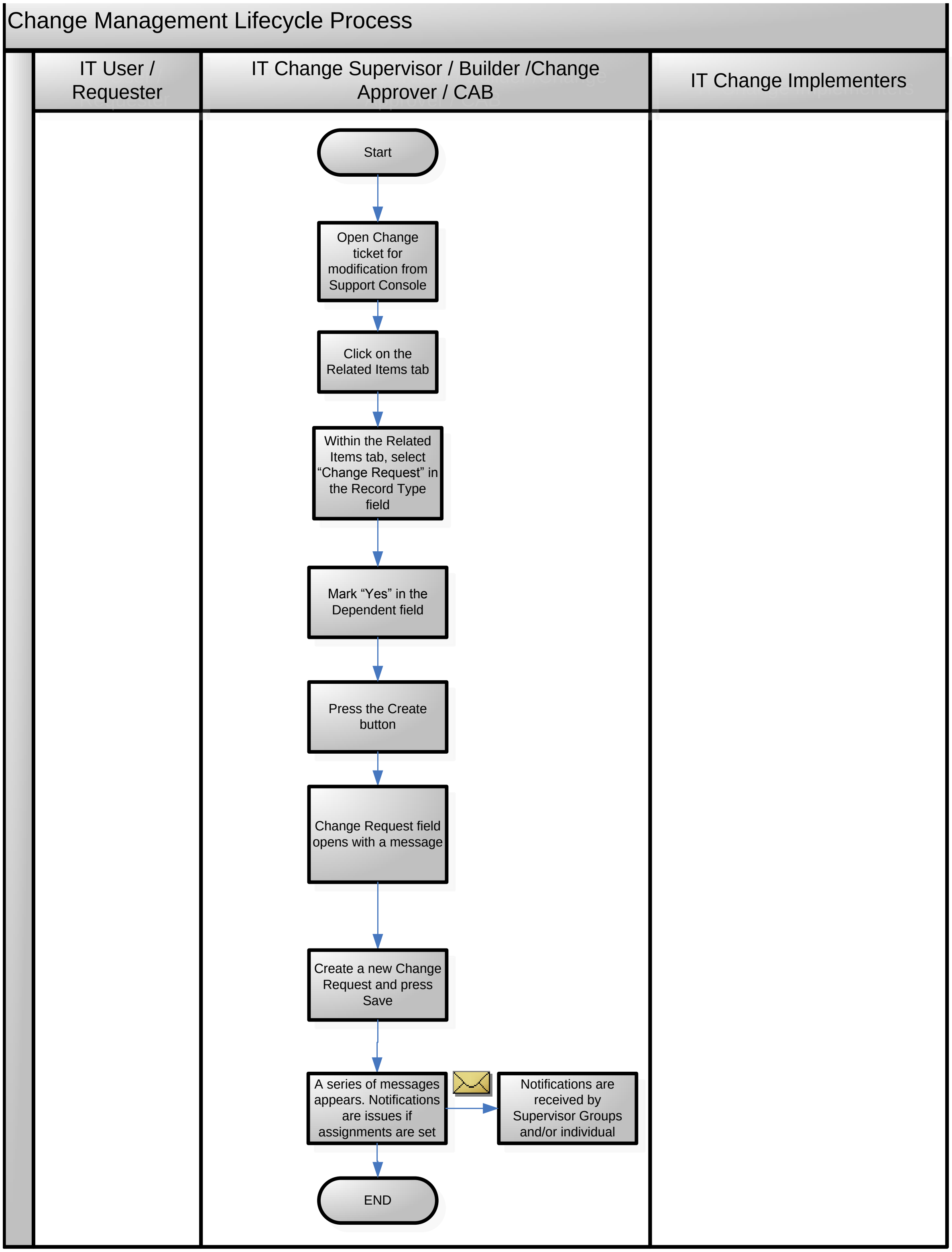
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct licensing to create and modify a request.
- The user has the correct permissions to create and modify a request.

BASIC COURSE OF ACTION

1) From the Remedy Support Console, the Change Supervisor selects a Change Request and opens the Request in a modify mode.
2) Click the Related Items tab.
3) Within the Related Items tab, select “Change Request” in the Record Type field.
4) In the Dependent CR field, select “Yes”. This selection enables you to create an associated Change Request that is dependent on the original request.
5) Click the Create button (in the lower-right corner of the tab).
6) A message instructs you to fill in the Sequence field for the Change Request. You must specify a sequence in which the Change Requests are completed when creating dependent Change Requests. The sequence number indicates the order in which this Change Request must be completed relative to the original Change Request.
7) A new Change Request Information form opens.
8) Create the Change Request (See UC-CM-01-Create a New Change Request for instructions on completing the Change Request).
9) When the user finishes creating the request, the user clicks the Save button.
10) The first message will appear confirming that a support staff member has been notified. A second message will appear indicating that the new Change Request has been related to the existing Change Request.
11) The original Change Request is displayed.

USE CASE PROCESS DIAGRAM



VIEW DEPENDENT CHANGE REQUEST

Use Case Name:	View Dependent Change Request
Description:	View Change Requests that are dependent to other Change Requests.
Actors:	Change Supervisor
Status:	Current

FREQUENCY

This use case is to be invoked when a Change Supervisor needed to view a dependent Change Request associated with the current Change Request.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The user has the correct permissions to view a Change Request.

POST CONDITIONS

- The Change Supervisor has been able to review dependent Change Requests.

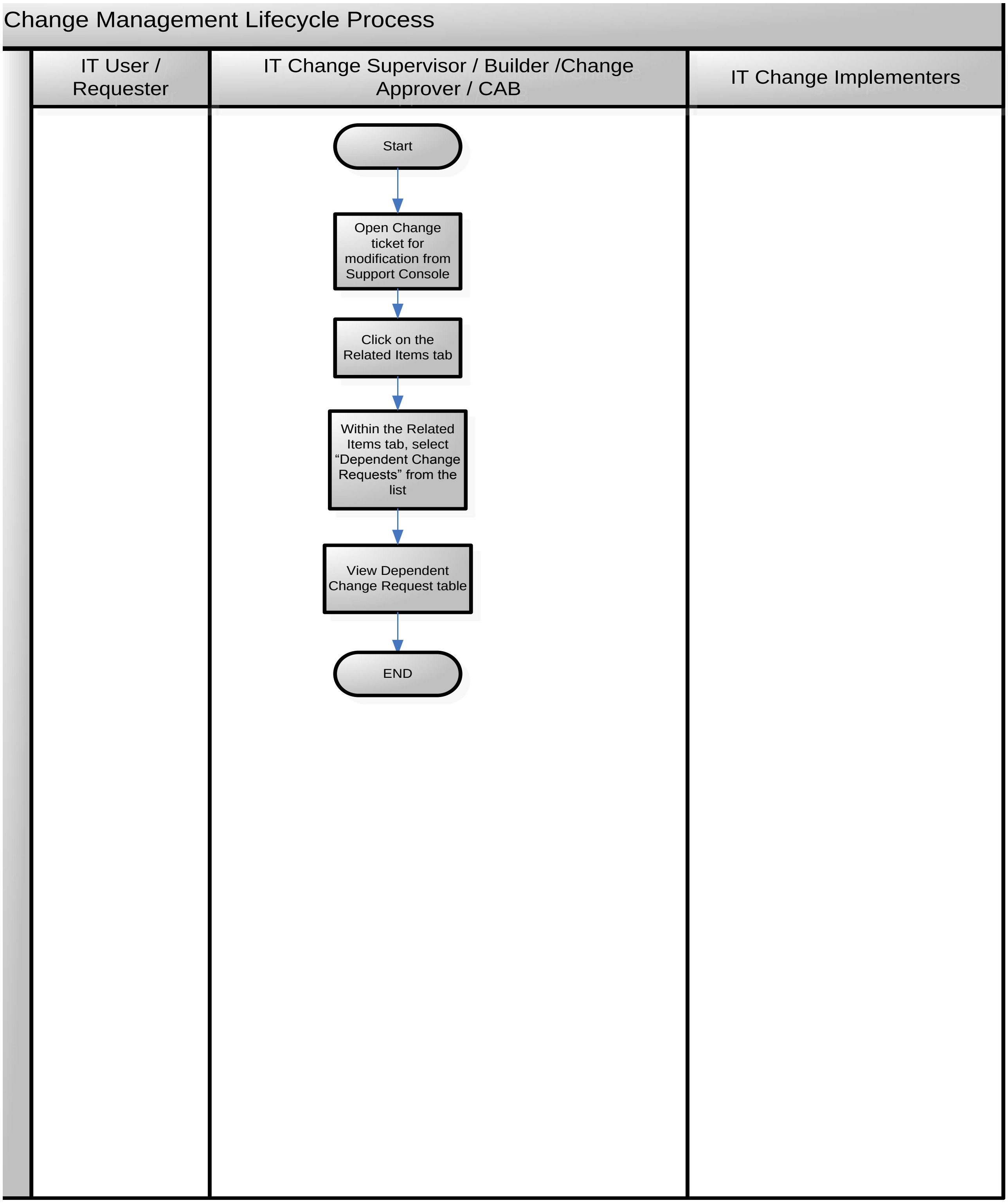
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- An existing Change Request is related to another Change Request.
- The user has the correct permissions to view a Change Request.

BASIC COURSE OF ACTION

1) From the Support Console, the Change Supervisor opens the Change Request.
2) Click the Related Items tab.
3) In the Show field, select Dependent Change Requests from the list.
4) A list of Change Requests that have a dependent relationship with the open Change Request is displayed in the table. The table shows the sequence number and status of each request and enables you to monitor the progress of the Change Request implementation. To view a request, select it and click View.

USE CASE PROCESS DIAGRAM



REMOVE DEPENDENT CHANGE REQUEST

Use Case Name:	Remove Dependent Change Request
Description:	This event removes the Change Request from its relationship with another Change Request. This action does not delete any Change Requests.
Actors:	Change Supervisor
Status:	Current

FREQUENCY

This use case is to be invoked when a Change Supervisor needs to remove any dependent Change Request that is associated with the current Change Request.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.

- The user has the correct permissions to create and modify a Change Request.

POST CONDITIONS

- The Change Supervisor has removed a Change Request from a dependent Change Request relationship.

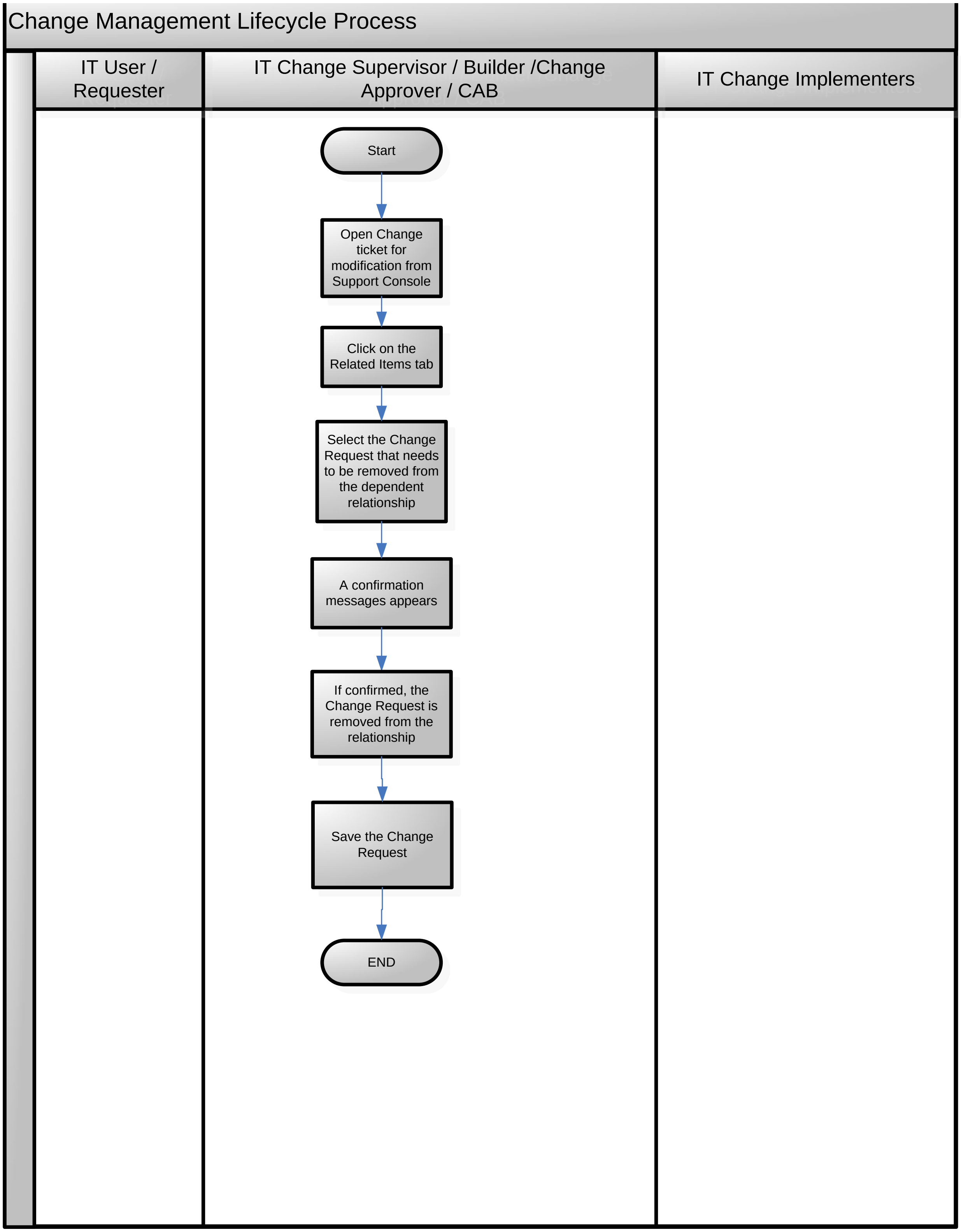
ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- An existing Change Request is related to another Change Request.
- The user has the correct permissions to create/modify a Change Request.

BASIC COURSE OF ACTION

1) From the Support Console, the Change Supervisor opens a Change Request.
2) Click the Related Items tab.
3) In the table, the Change Supervisor selects the associated Change Request that needs to be unrelated.
4) Click Remove Relationship. A message prompts the Change Supervisor to confirm the removal from the relationship.
5) The Change Supervisor clicks “Yes”. The Change Request has been removed from the dependent relationship.
6) The Change Supervisor saves the Change Request.

USE CASE PROCESS DIAGRAM



VIEW AN EXISTING RELATED ASSET RECORD (CONFIGURATION ITEM)

Use Case Name:	View an existing Related Asset Record (Configuration Item)
Description:	This event is for the Change Supervisor to view assets associated with the Change Request.
Actors:	Change Supervisor
Status:	Current

FREQUENCY

This use case would be invoked when a Change Supervisor would need to review assets associated to a Change Request.

PRECONDITIONS

- The user is logged into the Remedy Change Management application.
- The user is at the IT Service Management Support Console form in Remedy.
- The user has Change Supervisor permissions and responsibilities.
- The Configuration Item (CI) exists within the CMDB.

POST CONDITIONS

- The Change Supervisor reviewed associated Assets.

ASSUMPTIONS

- Person Information is stored in the SHR:People form in the Remedy Application.
- The user has a valid login and password for the Remedy Change Management application.
- The user has the correct permissions to create/modify a Change Request.

FORM NOTES

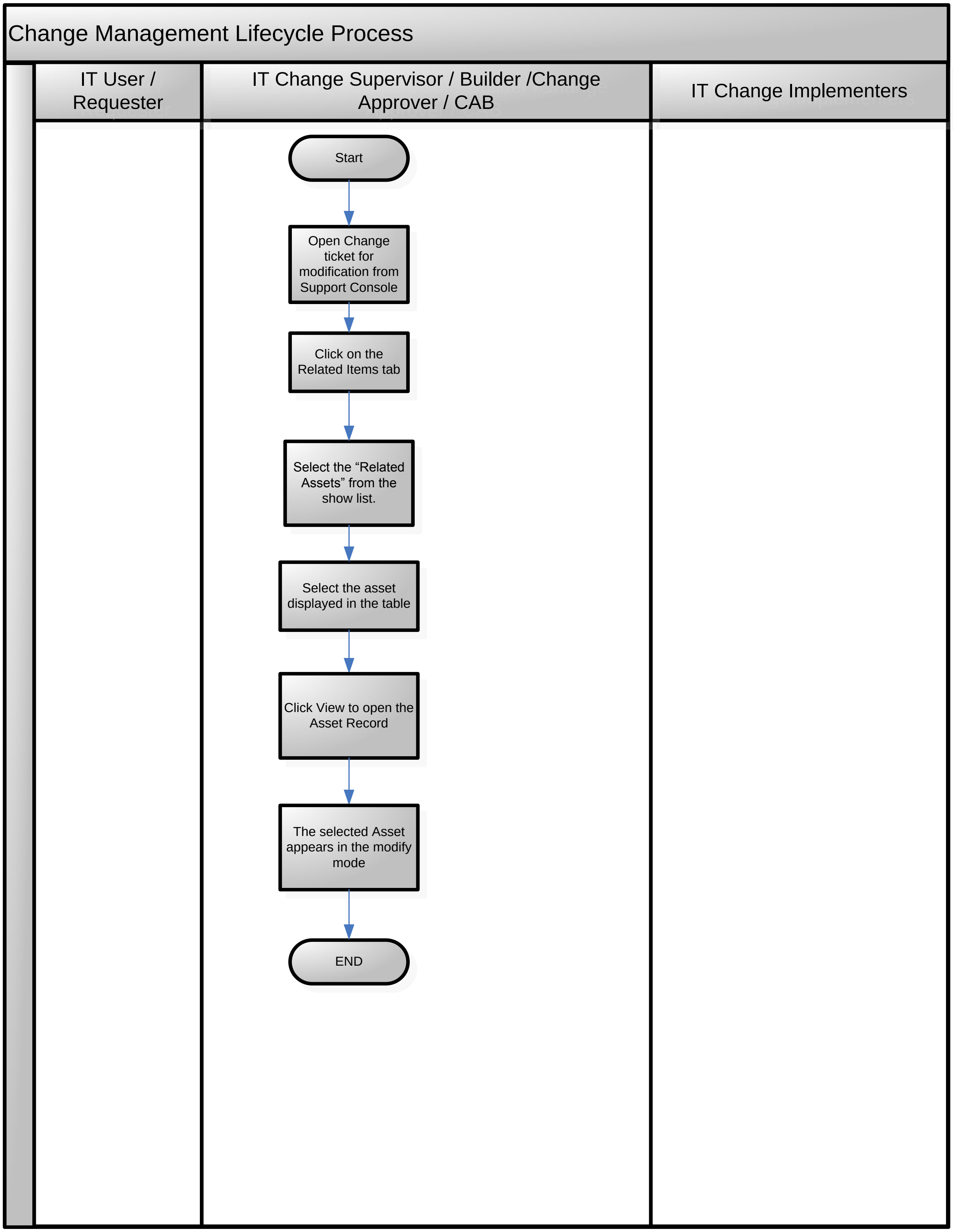
Configuration Management Database (CMDB)

The CMDB is divided into multiple classes (i.e. Computer Systems, Processors, etc.) with specific attributes for each class. Control of the CMDB should be limited to the Configuration Management team.

BASIC COURSE OF ACTION

1) From the Support Console, the Change Supervisor opens a Change Request.
2) Click the Related Items tab.
3) Select “Related Assets” from the Show list. The related assets, not including services and configurations, are displayed in the table. (Services and configurations are listed separately in the Show menu.)
4) Select the asset displayed in the table.
5) Click View.
6) The selected Asset record will open in a modify mode.

USE CASE PROCESS DIAGRAM


Change Management Lifecycle Process
IT User / Requester
IT Change Supervisor / Builder /Change Approver / CAB
IT Change Implementers
Start
Open Change ticket for modification from Support Console
Click on the Related Items tab
Select the "Related Assets" from the show list.
Select the asset displayed in the table
Click View to open the Asset Record
The selected Asset appears in the modify mode
END

ADVANCED REPORTS IN REMEDY

Brief Description: Custom reports in Remedy are generated through the advanced query function. The reports can be tailored to your specific needs by choosing from the specific categories and options. Care must be taken to limit the size of the reports to a practical size.

PRE-CONDITIONS:

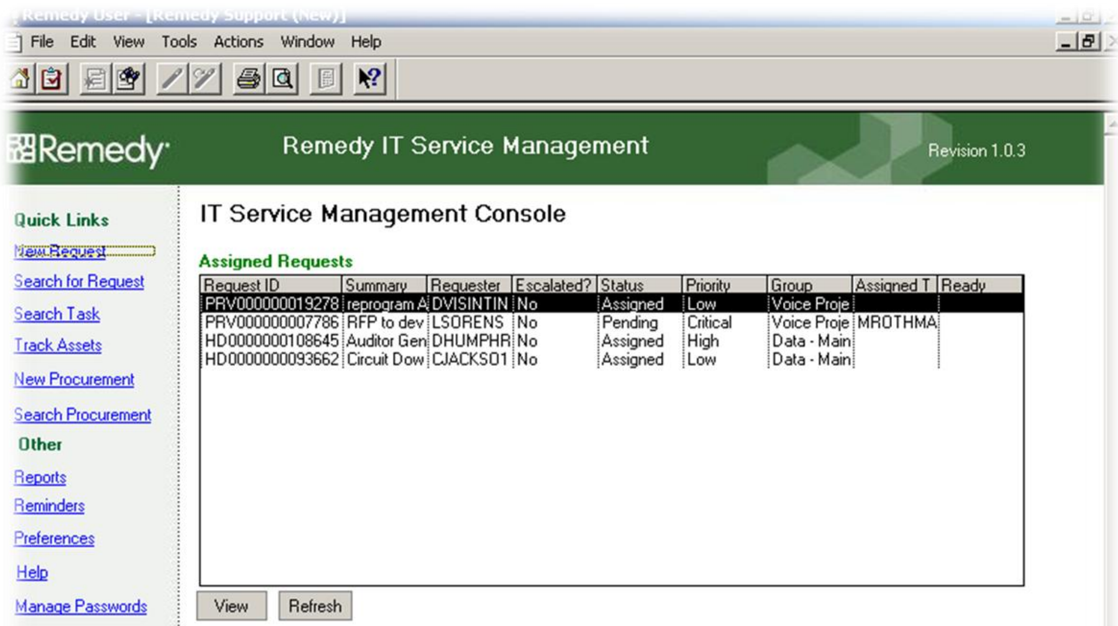
- You must have the Remedy client installed on your system
- Remedy Home Page is open on screen
- Advanced Search Bar is checked (under View)

USING ADVANCED QUERY:

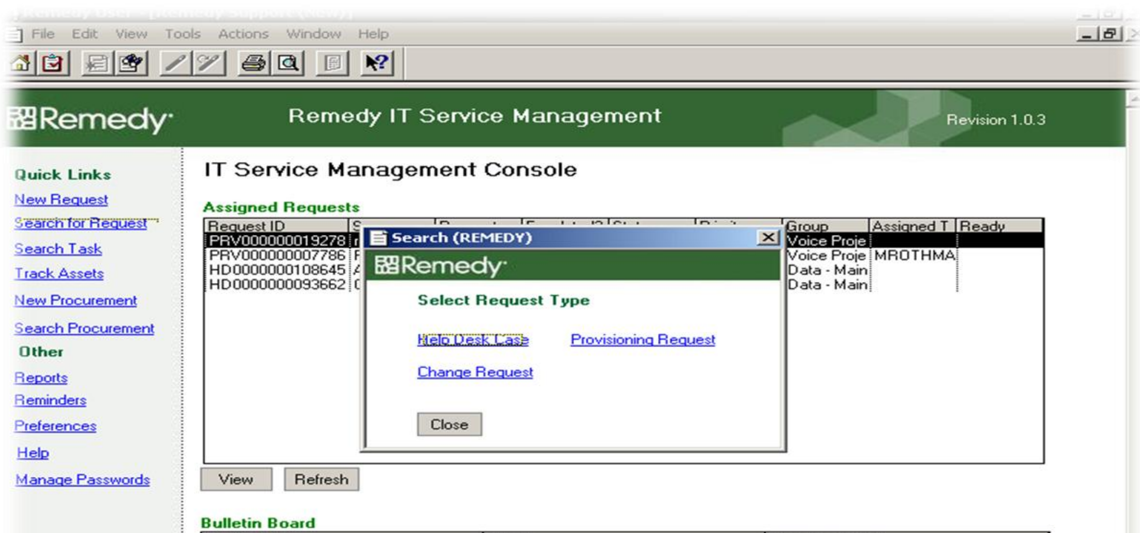
- This following instructions will demonstrate how to use advanced query to show all unresolved tickets.

1) Select Remedy Support
2) From list, single click on Remedy Support

3) The system displays the IT Service Management Console screen



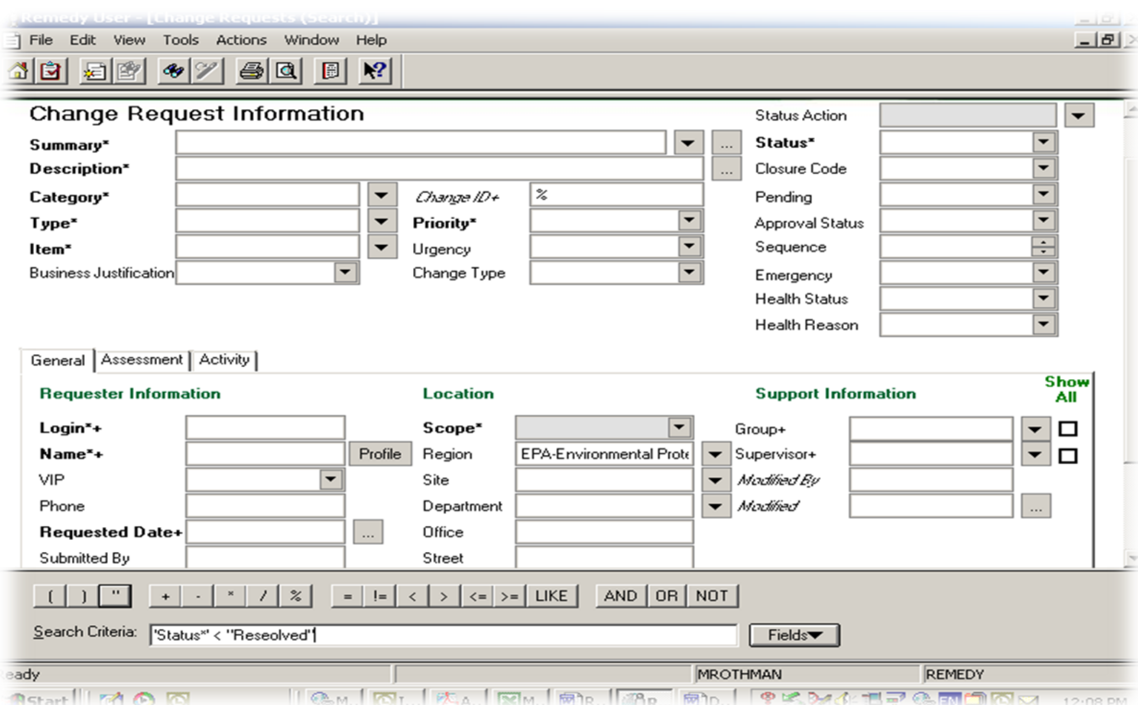
4) Select Search for Request
5) From Quick Links list, single click on Search for Request
6) The system displays the Select Request Type dialog box



NOTE:

- The box displays three options. Help Desk Case, Provisioning Request, and Change Request. Help Desk tracks service incidents, Provisioning tracks telecom projects and Change tracks ESR issues. The procedure is roughly the same for all. This M&P will use Change Request as the template. When there is a variation it will be noted.

1) Single click on Change Request
2) The system displays the Change Request Information page



3) Define the Search Criteria
4) In the Change ID field, enter a percentage sign (%)

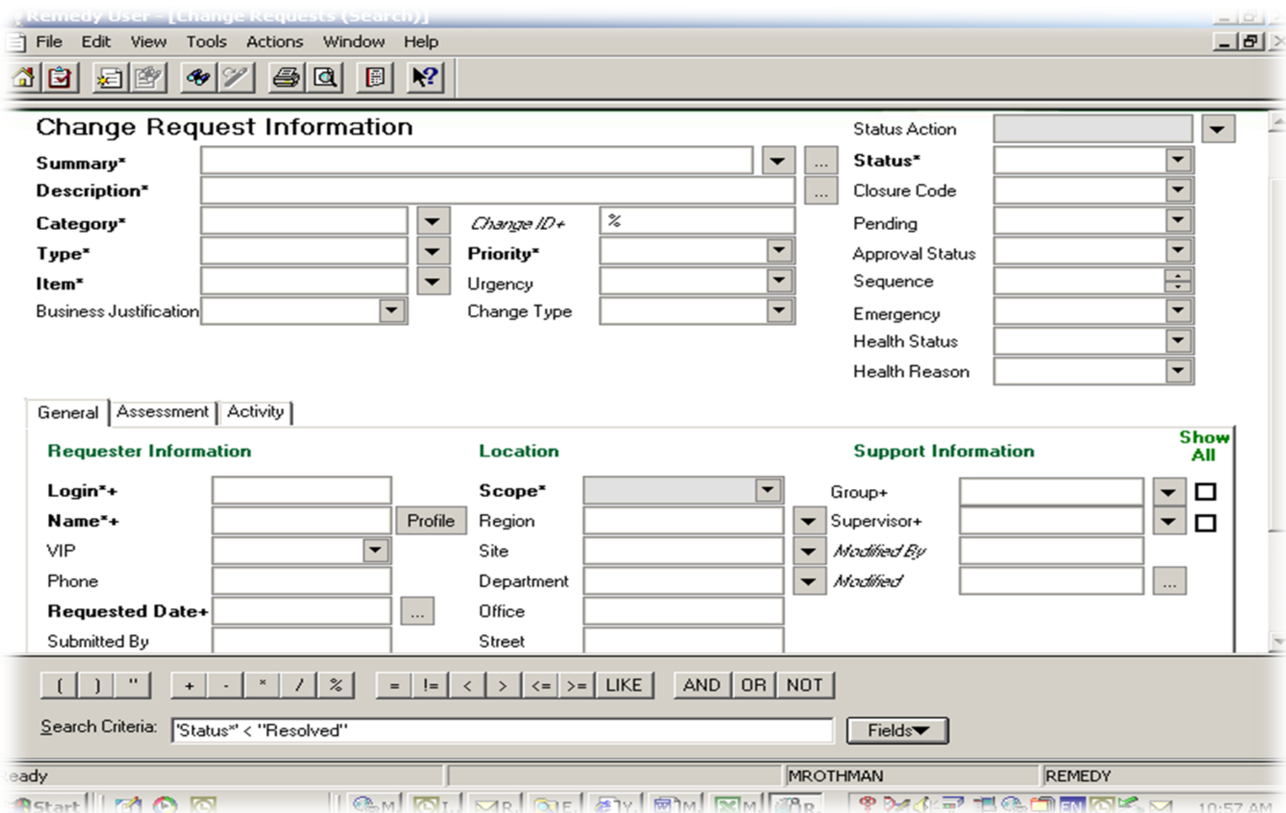
NOTES:

- For Provisioning Request enter % in the Request ID field

- For Help Desk Case, enter % in the Case ID field

1) Scroll down to the Region box. Use the drop down menu to select your agency. Double Click on the appropriate identifier.
2) Scroll back up and single click on the word Status in the upper right hand quadrant of the page

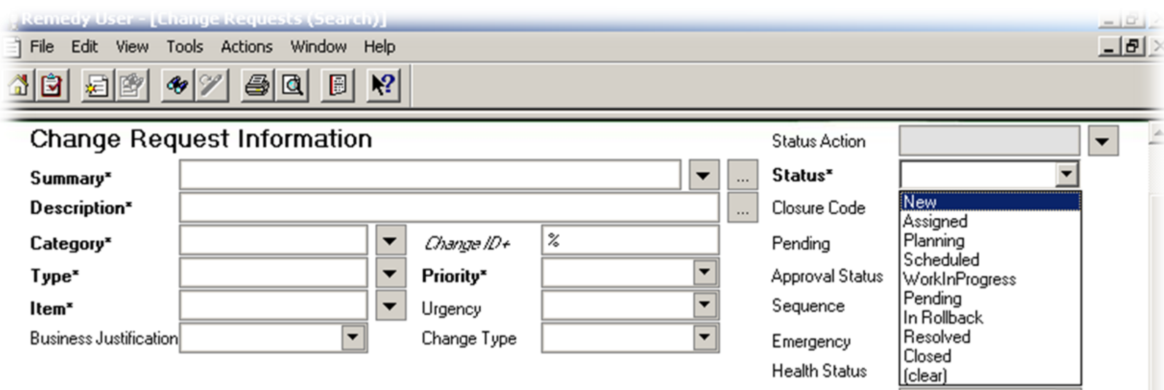
   The system displays the word Status in the Search Criteria box at the bottom of the page



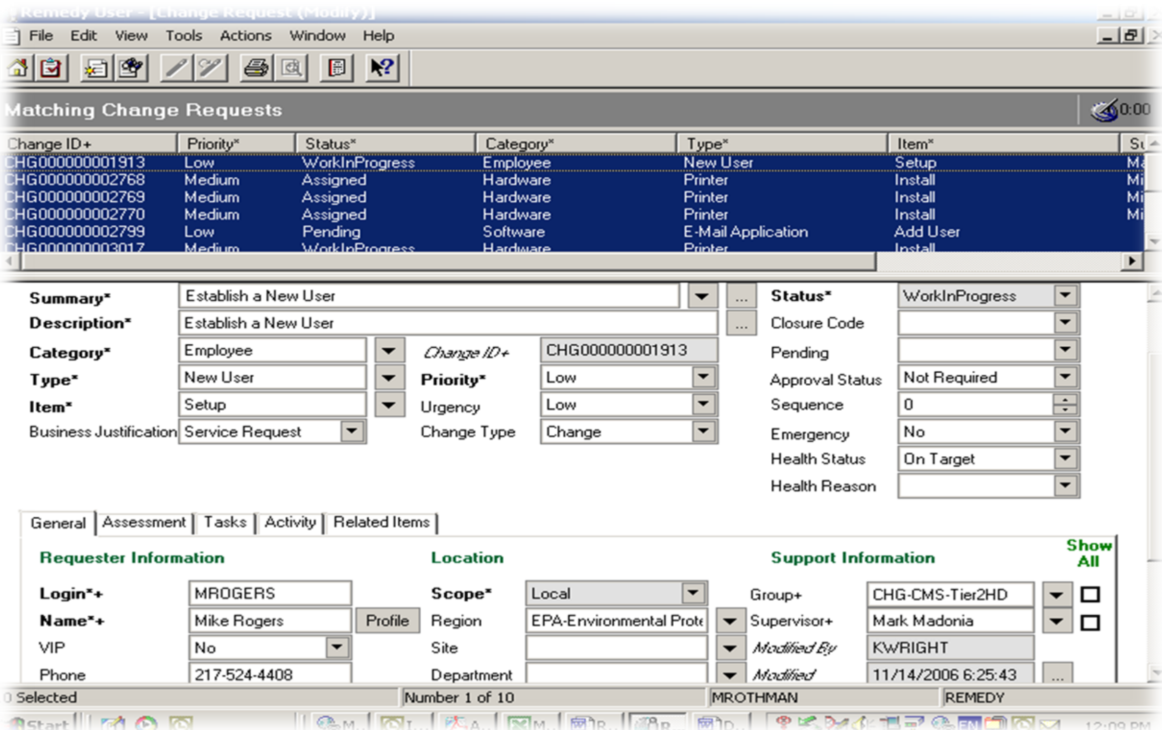
3) Click on the Less Than icon (<)
4) Click on the Double Quotation Mark icon (“)
5) Type the word Resolved
6) Click on the Double Quotation Mark icon (“)

NOTES:

- Do not add any spaces in the criteria chain.
- Resolved must be typed with a capital R and the other letters in lower case.
- You can also customize the search by using the criteria in the Status drop down box. This will not give you the flexibility you get from using the tools, but it will give you all the entries under the listed definitions. (See screen print below)



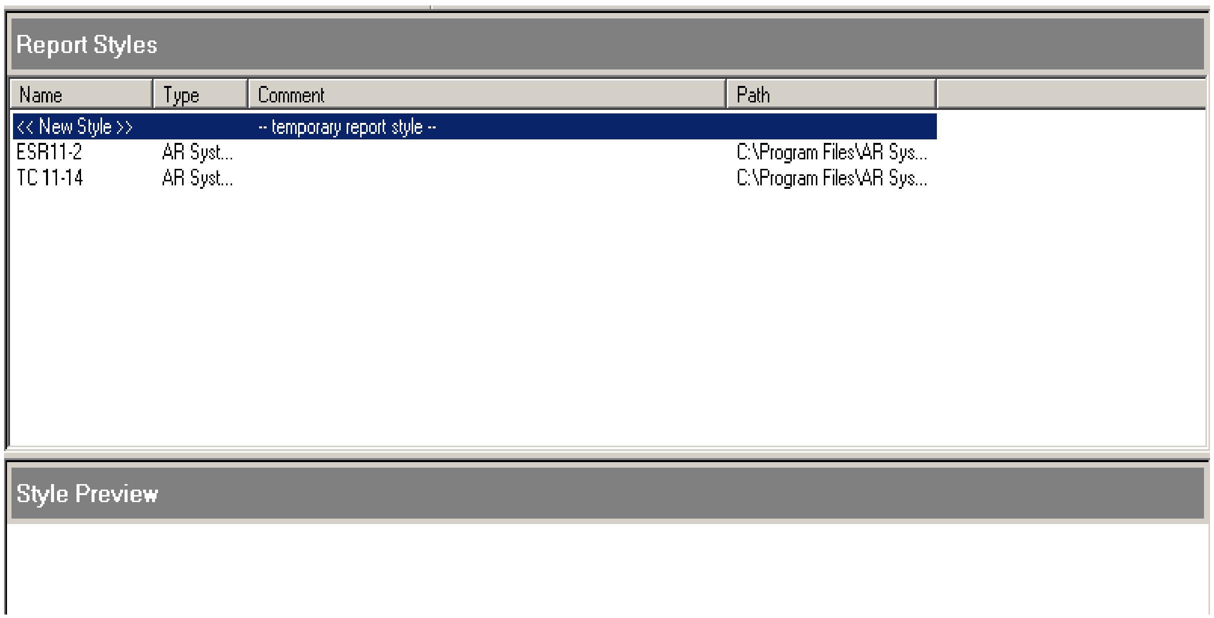
1) Scroll to the bottom of the page and click on Search
2) The system displays the Matching Change Requests screen



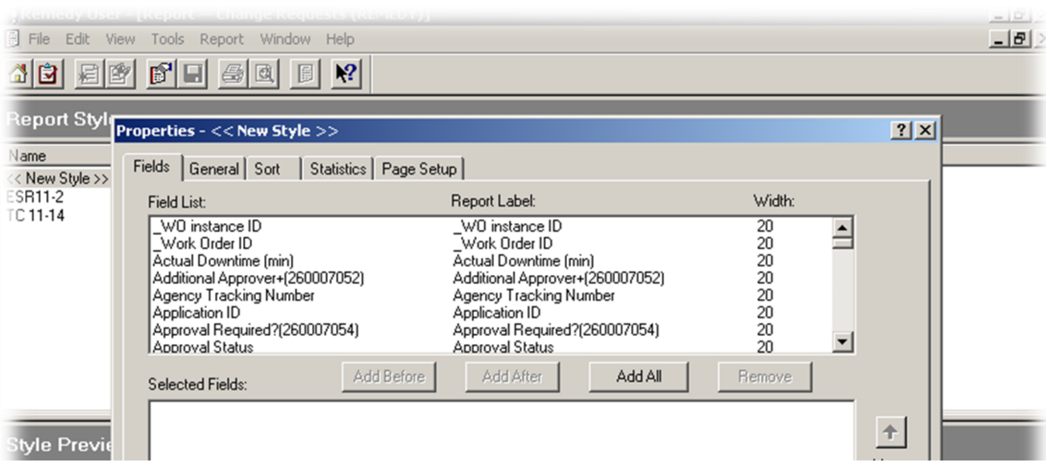
3) Select Records for report
4) From the box at the top of the screen, scroll down until the last record appears.
5) Press Shift and click on the last record. This will highlight all of the entries in the list.

6) Create Report Criteria
7) Click on Tools
8) From the Tools dropdown, click on Reporting

The system displays the Report Styles screen



1) Double click on New Style
2) The system displays the Field List



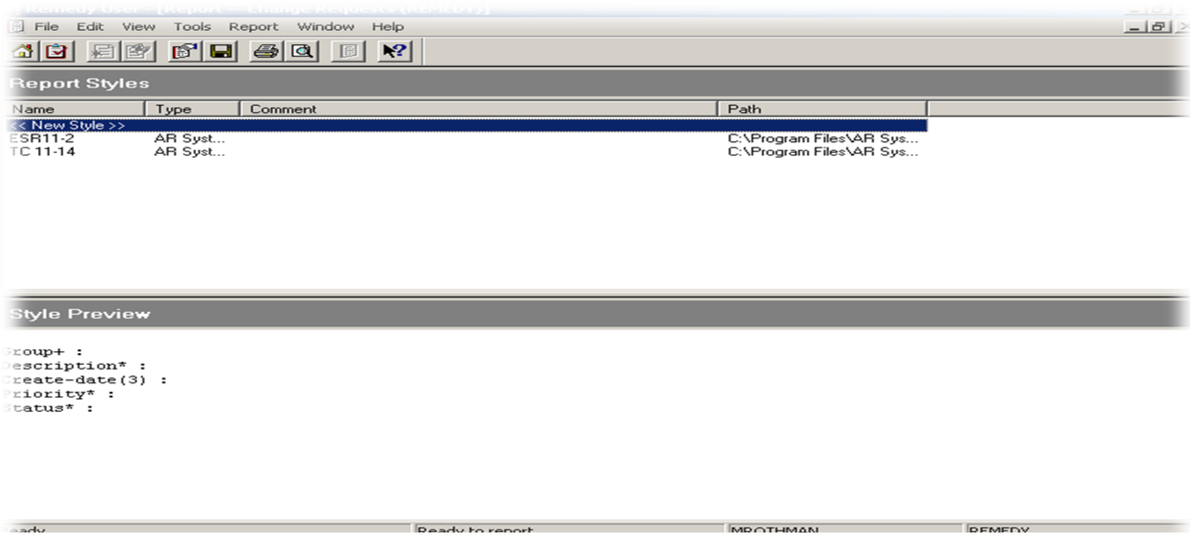
3) Scroll through the fields to select the fields you want to put in the report.
4) Use the Add Before and the Add After buttons to position the fields in the desired order.
5) If there is difficulty in putting the fields in the proper order, use the Remove button to take out a field and then re-enter it in the proper position.

NOTE:

- There are many fields available to you; too many to describe in this document. Use the standard entry format shown on the Matching Change Requests screen as your guide to what to include in your report.

6) When you have completed the field selection, single click the OK button at the bottom of the screen.

- The system displays the Style Preview in a window at the bottom of the screen.

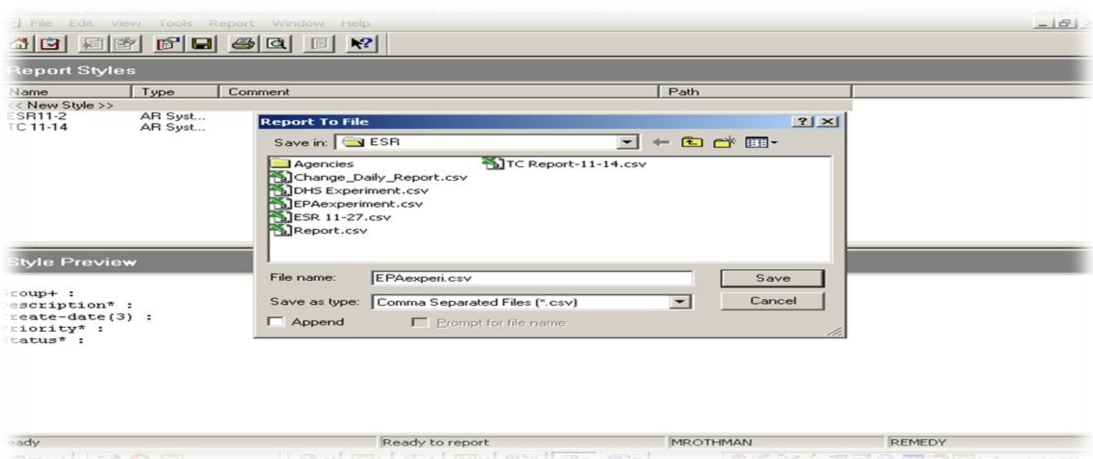


- Check to see if the desired fields are in place and in order

CREATE REPORT

1) Click on Report
2) Click on Export to
3) Click on File

- The system displays the Report to File box.



1) In the Save In box select where you want to store the document.
2) In the File Name box, enter what you want to call the document
3) In the Save As Type box select *Comma Separated Files (CSV)*
4) Click on Save. The system will save the document as the name you chose in the location you selected.
5) Minimize Remedy application.

Accessing the report

Open Excel

Press Control O to open a file (or go to the File menu and select Open)

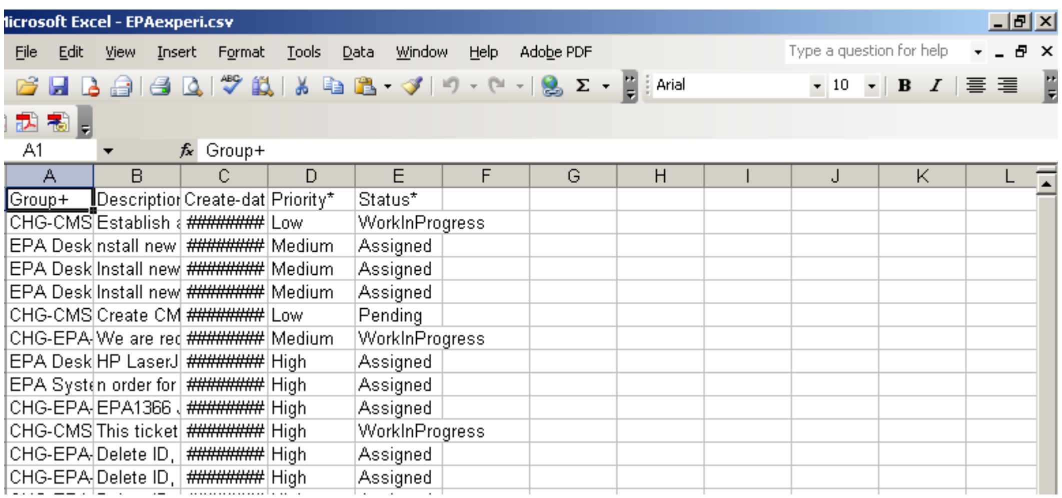
In the Look In box, select the location in which your report resides.

In the File Name box, use the drop down to select All Files

Find your report document and click on it

Click on Open

The system displays the Report.



Formatting the report

From the File menu click on Save As

In the Save As Type box, use the drop down to select Microsoft Office Excel Workbook

Click on Save

The system displays the Report as an Excel (xls) file

From the File menu click on Page Setup

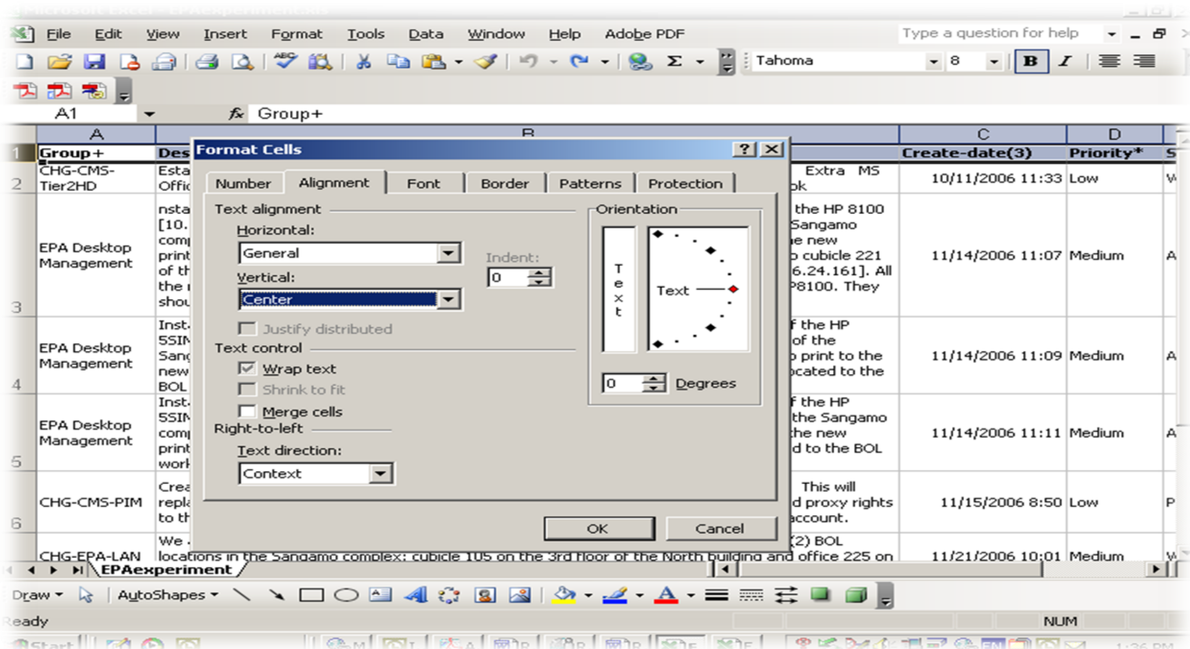
Click on the Page button

Click on Landscape view

Notes:

- All of the formatting steps are designed to have the spreadsheet information, for any single entry, fit on one page.
- Working in landscape format will allow you to have more information
- You can also use Page Setup to title your spreadsheet and add gridlines.
- A font like Arial or Tahoma works well in spreadsheets.
- Use 8pt or 6pt type size. This is large enough to read but small enough to have maximum space.
- Ultimately, how you format your spreadsheet is up to you and should reflect your needs.

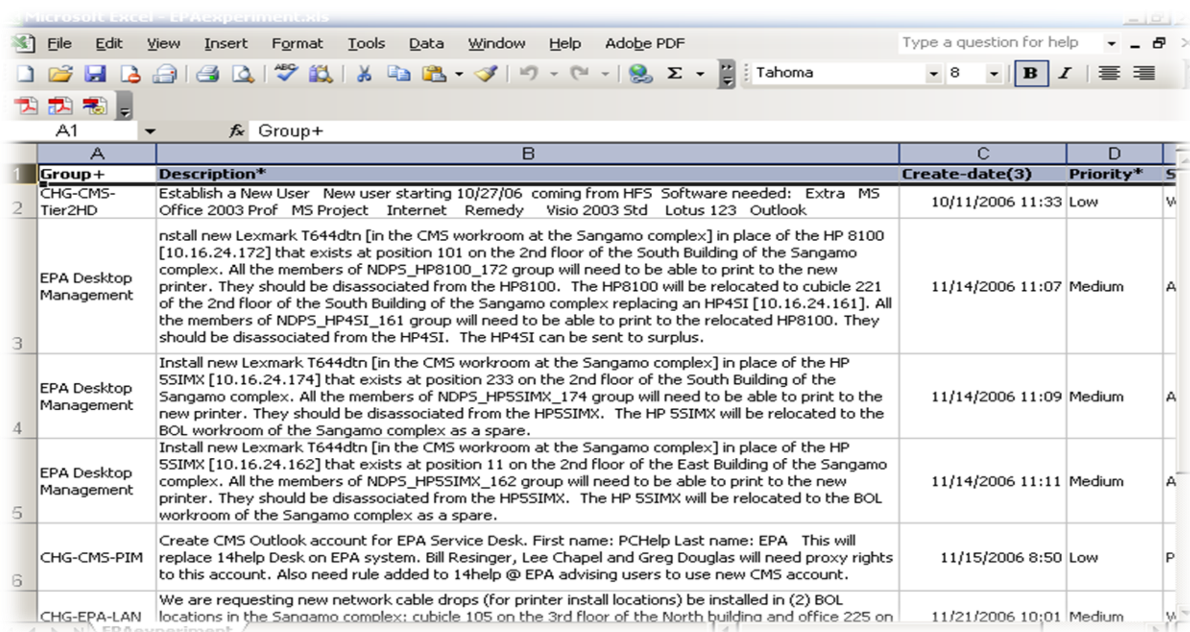
1) Type Ctrl A to select all records
2) Select your font and type size
3) Font defaults to Arial. You can choose any other font from the drop down at the top right of the screen.
4) Size defaults to 10 point. Since there is a large amount of information, a smaller size allows you to display more information per page. 6 point is recommended. Highlight the number to the right of the Font box and type 6. The system will change the size.
5) Click on any cell to remove highlighting of all cells
6) Format the columns by clicking and dragging on the column borders until they are at the desired width to fit on one page.
7) Type Ctrl A to select all records
8) Click on the Format button
9) Click on Cells
10) Click on the Alignment tab



11) From the Text Alignment/Vertical drop down, select Center
12) Under Text Control, select Wrap Text
13) Click OK

Notes:

- The Wrap Text feature is used to accommodate those entries that have large amounts of text (like description or work log). It wraps all of the text to fit within the cell and then automatically expands the depth of the cell to fit.
- The width of the cells must be set before you use this feature.
- The system displays the Formatted Report
- Save your work and modify to meet your needs.
- This completes the process for running a Remedy Advanced Query and utilizing the data in a spreadsheet



Group+	Description*	Create-date(3)	Priority*
CHG-CMS-Tier2HD	Establish a New User New user starting 10/27/06 coming from HFS Software needed: Extra MS Office 2003 Prof MS Project Internet Remedy Visio 2003 Std Lotus 123 Outlook	10/11/2006 11:33	Low
EPA Desktop Management	nstall new Lexmark T644dtn [in the CMS workroom at the Sangamo complex] in place of the HP 8100 [10.16.24.172] that exists at position 101 on the 2nd floor of the South Building of the Sangamo complex. All the members of NDPS_HP8100_172 group will need to be able to print to the new printer. They should be disassociated from the HP8100. The HP8100 will be relocated to cubicle 221 of the 2nd floor of the South Building of the Sangamo complex replacing an HP4SI [10.16.24.161]. All the members of NDPS_HP4SI_161 group will need to be able to print to the relocated HP8100. They should be disassociated from the HP4SI. The HP4SI can be sent to surplus.	11/14/2006 11:07	Medium
EPA Desktop Management	Install new Lexmark T644dtn [in the CMS workroom at the Sangamo complex] in place of the HP 5SIMX [10.16.24.174] that exists at position 233 on the 2nd floor of the South Building of the Sangamo complex. All the members of NDPS_HP5SIMX_174 group will need to be able to print to the new printer. They should be disassociated from the HP5SIMX. The HP 5SIMX will be relocated to the BOL workroom of the Sangamo complex as a spare.	11/14/2006 11:09	Medium
EPA Desktop Management	Install new Lexmark T644dtn [in the CMS workroom at the Sangamo complex] in place of the HP 5SIMX [10.16.24.162] that exists at position 11 on the 2nd floor of the East Building of the Sangamo complex. All the members of NDPS_HP5SIMX_162 group will need to be able to print to the new printer. They should be disassociated from the HP5SIMX. The HP 5SIMX will be relocated to the BOL workroom of the Sangamo complex as a spare.	11/14/2006 11:11	Medium
CHG-CMS-PIM	Create CMS Outlook account for EPA Service Desk. First name: PCHelp Last name: EPA This will replace 14help Desk on EPA system. Bill Resinger, Lee Chapel and Greg Douglas will need proxy rights to this account. Also need rule added to 14help @ EPA advising users to use new CMS account.	11/15/2006 8:50	Low
CHG-EPA-LAN	We are requesting new network cable drops (for printer install locations) be installed in (2) BOL locations in the Sangamo complex: cubicle 105 on the 3rd floor of the North building and office 225 on	11/21/2006 10:01	Medium